WOODSIDE NATIONAL HISTORIC PARK

VISITOR MARKET DEMAND STUDY

1986

BY

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Ontario Region
Environment Canada - Parks
111 Water Street East
Cornwall, Ontario
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RE: WOODSIDE NATIONAL HISTORIC PARK
VISITOR MARKET DEMAND STUDY

Dear Mr. Val:

Pannell Kerr Forster is pleased to enclose the final report of our Visitor Market Demand Study for Woodside National Historic Park in Kitchener, Ontario.

Our findings are based on research conducted at similar or comparable facilities in Canada and the United States, a review of historical operating statistics from Woodside, various statistical reports and planning documents supplied by Woodside management, interviews with present and potential users, and discussions with Parks Service and Woodside personnel. Additionally, our report reflects the advisory input of Mr. Chris Andrea, principal of Historica Resources, a specialist in facility and program planning.

We have enjoyed this opportunity to be of service to Parks Service on this assignment, and appreciate the extensive input provided by you, Woodside staff, and other Parks Service officials involved in the project. Your input and advice throughout the assignment have greatly facilitated the study process and are reflected in our findings and conclusions.

Should you have any questions or comments regarding the study findings, we would be pleased to discuss these at your convenience.

Yours very truly,

Pannell Kerr Forster

PANNELL KERR FORSTER

DTH/BKS/CJN/pmp/1758R

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SUMMARY OF FINDINGS AND CONCLUSIONS

It is apparent from the scope of research and analysis conducted for this study, that development of a visitor/administration building at Woodside is not only desirable, but in fact is required to service the current and projected operational needs of Woodside. Factors such as safety, congestion, and other operating limitations can only be alleviated through the development of this building.

Analysis also suggests that current capacity problems at Woodside will only get worse as attendance levels increase, to the point where visitation is negatively impacted by these problems. The visitor building will not only alleviate many of these problems, it will lead to even stronger visitation levels to the site.

It therefore, is our recommendation that the Parks Service strongly consider the development of a visitor/administration building at Woodside National Historic Park and allocate the required capital and operating funds.

Our research and analysis supports these conclusions, with rational and supporting analysis summarized below.

1. Over the 1976-1985 time period visitation to Woodside has increased by an annual compound growth rate of 6.2%. Our analysis of overall market conditions affecting visitation as well as analysis of the specific visitor segments patronizing Woodside, indicates that this growth will continue however at rates lower than those achieved historically.

2. A detailed capacity analysis shows that the existing historic building will reach peak loadings of between 40 to 50 visitors some 30 to 20 percent of the time annually by 1995.

3. Analysis of market conditions has suggested that three alternatives to development exist for Woodside. These alternatives include:

Alternative 1 - Status Quo

- assumes no further development of facilities or programs at Woodside, with visitation projections representing increases based on continued market growth

Alternative 2 - Visitor Buildings

- assumes development of a visitor/administration building at Woodside with no further programming or marketing, but with improved market position as a result of improved operation

Alternative 3 - Visitor Building/Marketing Strategy

- assumes development of visitor/administration building at Woodside, but includes further improvement in market position as a result of improved operations and marketing

The resulting visitation projects are summarized below.

Visitation	Alternative 1	Alternative 2	Alternative 3
1985	38,391	38,391	38,391
1990	45,151	49,045	50,669
1995	53,156*	59,259	63,099
Annual Compound Growth (1985 - 1995)	3.3%	5.0%	5.1%
Average Annual Increase (1985 - 1995)	1,476	2,087	2,471

* Represents theoretical market potential, however operational and functional capacity limitations suggest a lower level of achieved visitation.

SECTION I - INTRODUCTION

1.1 Background

In February 1986, Pannell Kerr Forster was retained by Parks Service to conduct a Visitor Market Demand Study for Woodside National Historic Park in Kitchener, Ontario.

As identified by Parks Service, the study was to provide market substantiation for a proposed administration/visitor building valued at $400,000-600,000 and which would serve 40-65 people. The function and role of the visitor use component of the building would be similar to those currently existing with the addition of a visitor reception function.

1.2 Objectives and Scope

The primary objectives of this study were to determine the market potential, development guidelines and visitor utilization (over a five year period) of the proposed visitor centre at Woodside National Historic Park and to substantiate within the program context, the service/function requirements for a visitor centre at this site. Specifically, these objectives included:

- to demonstrate how the visitor use area of the proposed building could be optimally used each year for a five year period after opening; and

- provide data which would be used to identify the space requirements of the visitor use area of the package building.

To achieve these objectives, primary and secondary research was conducted, as it pertained to the Park, to tourism in the Waterloo Region and to comparable facilities. Primary research consisted of reviewing and analyzing: park documents relating to visitation, programming, development and operations; reports and documents on tourism

and activity participation in the Region of Waterloo and Ontario, and documentation pertaining to comparable facilities. Secondary research consisted of conducting interviews with representatives of the various park user groups, tourism industry representatives and comparable historic houses in North America. Thus, the scope of work included:

- an overview of park facilities and operation;
- analysis of visitation/utilization:
- evaluation of the local/regional tourism infrastructure;
- interviews with comparable historic homes throughout North America;
- telephone interviews and discussions with existing and potential use groups;
- projections of future utilization of the park;
- development of marketing and operating guidelines to achieve the most effective utilization of Woodside National Historic Park

On the following pages, we have summarized the results of our research, and our findings and conclusions.

SECTION II PARK OVERVIEW

2.1 Site and Facility Review

Site

Woodside National Historic Park consists of a restored, middleclass Victorian home built in 1853 and restored to the 1890's, located on an 11.5 acre (46,500 m^2) site in Kitchener, Ontario. Owned and operated by Parks Service, Woodside is located at 538 Wellington Street North in Kitchener, on the north east corner of Wellington Street and Spring Valley Road.

The park is accessed from downtown Kitchener via King Street, with signage situated along the major roads entering Kitchener directing visitors to the site. If accessing the park via Conestoga Parkway, visitors take the Wellington Street West exit. Currently, visitors enter the site from Wellington Street and exit onto Spring Valley Road. Signage and visibility is adequate at the Wellington Street entrance point.

Woodside is situated in a mixed use area with residential development to the south and west, and industrial development to the north and east. A Canadian National Railway line runs north/south through the western portion of the property, separating the park and industrial areas.

Facilities at the present time include the house itself, as well as some picnic/open space on the surrounding property. Parking for 24 vehicles is located immediately adjacent to the north side of the house, with no area designated specifically for buses.

Existing Facilities (The Woodside House)

The house is the focal point of most of the activity occurring at Woodside National Historic Park. Woodside is a re-creation of the domestic setting within which Mackenzie King grew to manhood.

The house has been reconstructed to represent its possible appearance in 1891. It includes an interpretive centre in the basement, which originally would have been the root cellar and cistern. The original kitchen wing was rebuilt on a larger scale to provide space for administration offices. The upstairs has also been altered in order to accommodate additional administrative space. Current utilization of space within the house is summarized in Exhibit II-1.

EXHIBIT II-1

FLOOR SPACE ALLOCATION - WOODSIDE, 1986

	Administration		Interpretive Centre		Restored Space		Total	
	Sq. Ft.	Sq. M.	Sq. Ft.	Sq. M.	Sq. Ft.	Sq. M.	Sq. Ft.	Sq. M.
Basement	1,069	99	1,231	114	--	--	2,300	214
Ground Floor	617	57	--	--	1,700	158	2,317	215
Upstairs	370	34	--	--	1,567	146	1,937	180
Total	2,056	191	1,231	114	3,267	304	6,554	609

Note: Numbers may not add due to rounding

Source: Woodside National Historic Park

A significant portion of space is currently being utilized by administrative and interpretive functions. While these functions do not interfere with the visitor experience in the remainder of the house, they do not permit the maximum operational efficiency that could be achieved if the house was a complete re-creation (including summer kitchen, laundry room and servants quarters) and functions were located elsewhere.

Summary of Site and Facilities Factors

The site location does not benefit from the natural tourist flows entering the Waterloo Region. However, signage and ease of access suggest that tourists who are looking for the site will have little difficulty locating it.

While facilities at this time are limited to the house and the picnic/open space around it; the area development plan suggests the requirement for additional on-site amenities. These facilities will serve to enhance the site as a tourist attraction, and through their interpretive potential, will serve to maximize the visitor experience.

The visitor/administration building will facilitate the effective and efficient administration of the visitor experience at Woodside, and will reduce the number of occasions when groups/individuals are turned away due to insufficient basic facilities such as washrooms.

2.2 Project Justification

Based on our evaluation of facilities at Woodside, as well as discussions with Park management it is apparent that there are a variety of operational concerns at the Park as a result of the present facilities.

Safety

Access to the public washrooms and to the theatre/exhibit area in the basement is by steep and confined stairs, which represent a concern for visitor safety. The problem will be eliminated with the relocation of the basement facilities to the new building.

Disabled/Elderly Access (barrier-free design)

The steep stairs to the only public washrooms cannot be negotiated by many aged and disabled people. As a matter of policy and of service to the public, accessibility to the washrooms is considered a priority. Visitor reception services, including the resource area, the cinema and displays are also in the basement and are not available to this group of visitors.

Staging Area

At present, congestion occurs in the house when two or more bus/group tours arrive during the same period of time. Separation between groups is arranged but with difficulty. During these times the enjoyment and appreciation of the historic house is lessened

sharply. The solution for these occasions will be to "hold" one of the groups in a pre-visit staging area which provides separate visitor reception, orientation and interpretation. Group tours since 1981-1982 have increased in numbers by some 8.0% per year and increased in number of people by some 5.0%. Maximum bus tour group size is approximately 50 people. Group tours account for over one quarter of total visitation. In 1984 an estimated 40 tours had to be cancelled due to overbooking. These estimated cancellations affected some 1,200 individuals.

In addition to purely operational concerns, our research indicates other constraints which are currently being experienced at the site.

Inappropriate Use of Historic Structure

The administrative and operational functions presently in the house detract from the historic atmosphere, and occupy space which could be used for interpretive purposes. Historic accuracy cannot be achieved as long as the administrative functions remain in their present location.

Quality of Experience

In addition to eliminating the conflict of administrative and interpretive uses, removal of the administrative function would significantly improve the visitor experience through restoration of the kitchen, reduction of congestion in peak traffic periods.

Small Sales Area

The site currently does not have a small sales area. Such an area in the new building would be useful particularly if in the future a cooperating association is established.

Additional Concerns

There are many other concerns (non-operational) related to the present facility which would, potentially, be alleviated by the addition of the visitor/administrative building; in conjunction with completion of the overall development plan. While it was beyond the scope of this study to assess needs not directly related to the proposed visitor/administrative building, we would recommend that the reader refer to the Area Development Plan and the Draft Interpretation/Visitor Service Plan prepared in 1985 for Woodside National Historic Park to obtain additional information regarding proposed solutions to these needs.

Policy

Through our analysis it has become apparent that specific aspects of Parks Canada Policy are not achievable due to existing operational constraints at the site. Policy pertaining to "Protecting Heritage Resources in National Historic Parks" deals with preservation and the historic environment. Some specific issues include: fire, temperature and humidity control; preservation/restoration of authentic historic form, administrative and visitor facility location; buffer zones; and the need to ensure that the historical environment is not disturbed by other uses. The fulfillment of these policy measures is limited due to the operational problems associated with the inappropriate use of the historic structure and the existing conflict of administrative and interpretive uses.

Policy pertaining to "Public Understanding, Appreciation and Enjoyment of National Historic Parks" is also impacted upon by current operational problems at Woodside. With respect to information and interpretation; interpretive programming at National Historic Parks is based on the historic resources at that park and the themes of Canadian history which they illustrate. This cannot be accomplished at Woodside because of the denied opportunity to access other resources in the building. In addition, the primary purpose of visitor use at national historic parks is to encourage an understanding and enjoyment of Canada's history and of historical resources. To accomplish this, Parks Canada will provide those services and facilities which are essential to public enjoyment of a particular National Historic Park, in ways which do not intrude upon the historic

environment. These policy measures are also limited by the conflicting uses within the building and the intrusion of the administrative and operational functions presently in the historic areas of the house. In addition, the Visitor use, services and facilities are not available to all as the house is not accessible to the disabled. The Parks Service Management Directives clearly state that:

> Parks Canada will provide essential services (e.g. access, sanitation, interpretation, campsite (where applicable) and picnic facilities) for the disabled. These services will preferably be integrated with those provided to the general public.

Currently, the house is not accessible to the disabled and elderly due to the steep stairs to the basement, stairs within the house and stairs to the upper level of the house, make the visitor reception services, resource area, cinema, displays, and washrooms as well as significant portions of the historic house completely inaccessible.

It is necessary to overcome these deterents and confom to Park policy. Development of a Visitor/Administrative Building will permit the Park to conform to most if not all of those policies.

Summary

Our review of the site and the house confirms many of the operational constraints expressed by site administration. It is our opinion that development of a Visitor/ Administrative Building on-site would alleviate many, but not all of the constraints identified. Specifically, the benefits would include:

House

1. Operational

- improved ability to manage the facility
- relocation of the administrative functions and theatre and didactic display to the visitor/administrative building from the house eliminates conflicting uses

- increased safety
- ability to collect fees when this policy is implemented
- provides a holding area for groups/individuals who may arrive at a time when the house does not have adequate capacity

2. Visitor Comfort

- additional washrooms (as required)
- closer interaction between display areas and their interpretive planning and preparation areas
- decreased congestion
- ability to accommodate groups without excessive crowding
- improved interpretive potential of the house by removing administrative functions from historical areas in the house

3. Historical Inaccuracies

- reconstruction of the historically significant rooms currently utilized for administration functions

Grounds

1. The Visitor/Administrative Building will have little or no impact on the development and/or interpretation of the grounds if the building is appropriately designed and landscaped.

2. The Visitor/Administrative Building will lessen the impact of climatic and seasonal factors by providing additional indoor programming space.

Visitor Service Concerns

1. Access and Circulation

- The Visitor/Administrative Building will reduce congestion and remove need for public access to the basement.
- It will improve programming capabilities for the handicapped if facilities are developed appropriately.

2. Public Comfort

- Will permit provision of required washroom facilities with improved access.
- Will provide for improved seating/resting areas for the handicapped and elderly.

3. Reception and Signage

- The Visitor/Administrative Building will provide for proper visitor reception and delivery of information prior to entering the house.

2.3 Analysis of Visitation/Utilization

Introduction

The analysis of visitation and user groups to Woodside National Historic Park has been based on a review of data supplied by the Socio-Economic Research Unit, a review of the draft Interpretation/Visitor Service Plan, and through analysis of data supplied by the site itself.

User Groups

Visitors to Woodside include the casual - small family type groups of 2-4 members, individuals and seniors. On an annual basis, as determined from the 1985 Visitor Attendance forms, casual visitors account for 70% of visitation and group visitors account for 30%. Education groups, for whom curriculum related programming is provided, comprise the greatest proportion of organized group visitation (53% of total group visitors in 1985), followed by tour groups (25%) and special interest groups (22%).

Local community residents use the non-historic facilities at Woodside for picnicking and family recreation. Statistics are unavailable for these park visitors, as there is no method of accounting for the number of visitors to the grounds only. In addition, historic facility users also use and enjoy the grounds at Woodside, although not to the same intensity as local park users, specifically community residents.

Visitation Characteristics

Overall visitation figures for Woodside over the period 1976 - 1985 indicates a period of strong demand growth and are summarized in Exhibit II-2 and II-3.

EXHIBIT II-2

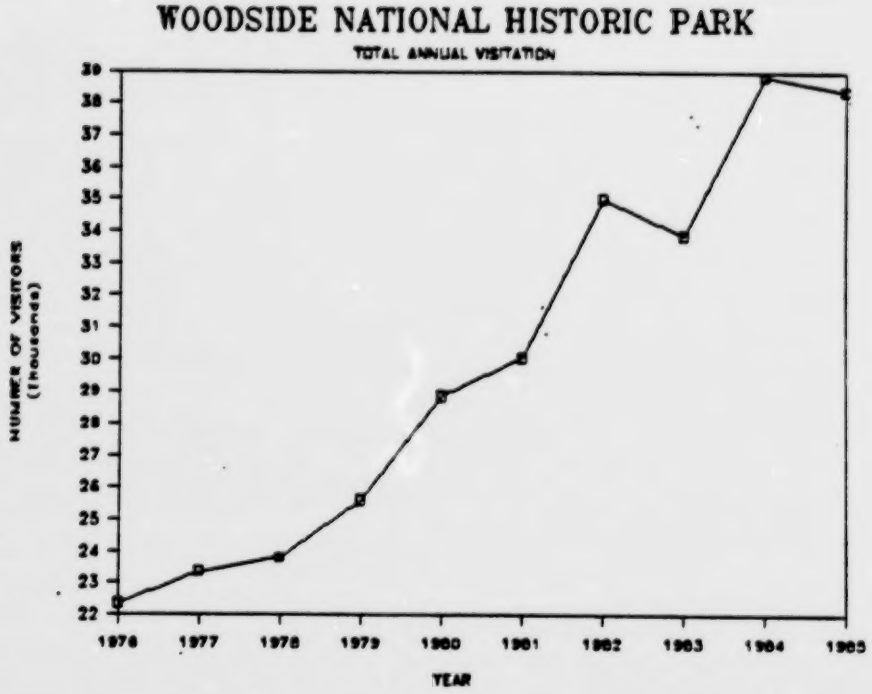

WOODSIDE NATIONAL HISTORIC PARK
TOTAL ANNUAL VISITATION
NUMBER OF VISITORS (thousands)
39
38
37
36
35
34
33
32
31
30
29
28
27
26
25
24
23
22
1976
1977
1978
1979
1980
1981
1982
1983
1984
1985
YEAR

EXHIBIT II-3
VISITORS TO WOODSIDE NATIONAL HISTORIC PARK
1976 - 1985

	Visitors	% Change
1976	22,343	--
1977	23,358	4.5%
1978	23,797	1.9
1979	25,605	7.6
1980	28,835	12.6
1981	30,051	4.2
1982	35,006	16.5
1983	33,867	(3.3)
1984	38,826	14.6
1985	38,390	(1.1)

Note: Based on calendar year

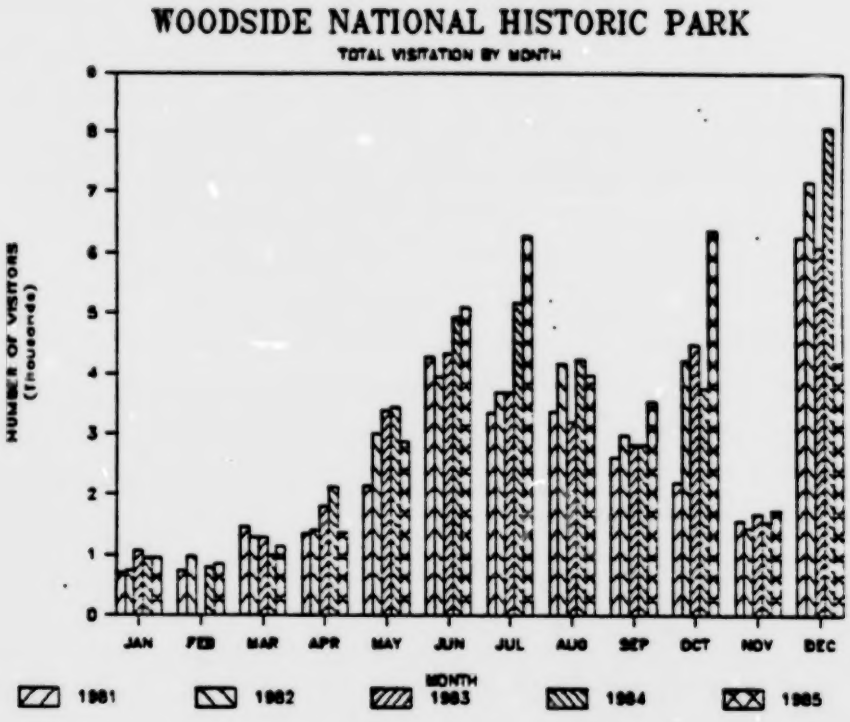
Source: Visitor Registration Forms

Over the 1976-1985 time period visitation to Woodside has increased by 71.8%, an annual compound growth of 6.2%. Over the 1981-1985 time period, visitation increased by 27.7%, an annual compound growth of 6.3%.

Exhibits II-4 to II-6 summarize visitation to the park over the 1981 - 1985 time period.

As shown in Exhibit II-4, the months with the highest levels of visitation are historically July and December (with some exceptions - i.e. December, 1985), with June, August and October, also being strong. Much of this is due not ony to the normal summer family vacation traffic, but also the special events scheduled on summer weekends, and at Christmas. Variations occur year to year due to weather, media coverage, publicity, promotions and special events. The weakest months for visitation are January to April and November.

EXHIBIT II - 4


WOODSIDE NATIONAL HISTORIC PARK
TOTAL VISITATION BY MONTH
NUMBER OF VISITORS
(Thousands)
0
1
2
3
4
5
6
7
8
9
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC
MONTH
1981
1982
1983
1984
1985

As reported in the 1982 Socio-Economic Study - "Woodside shows a relatively consistent pattern of low weekday use; moderate Saturday use; and relatively high Sunday and holiday use, especially in December." The bulk of park visitation occurs daily between the hours of 10-4 p.m., Saturday attendance seems constant throughout the day, while on Sundays, visitors arrive by lunch time and continuously all afternoon.

The average length of stay for the casual visitor to Woodside is fifty minutes. This time period allows for either a self-guided tour of the house, or an interpreter guided tour (total 15-30 minutes), an examination of the didactic display and screening of an audio-visual presentation (total 20-25 minutes). Many summer visitors extend their overall park stay by taking advantage of the picnic facilities available on the grounds.

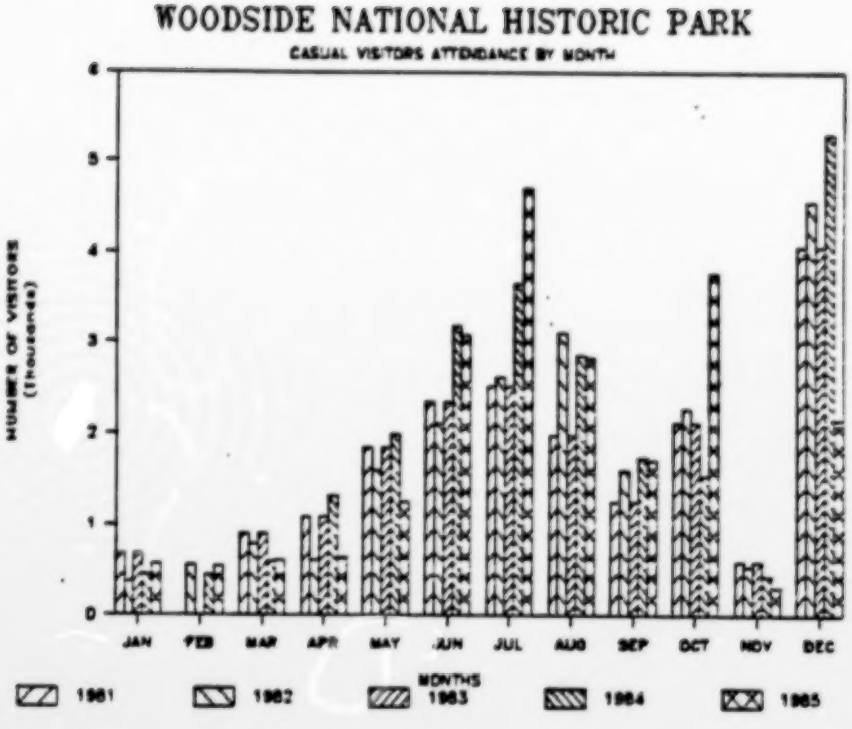
Special Events

During the past few years, special events programming has become an important method of drawing visitors to Woodside. According to staff observation, many area families return to enjoy these events, at Easter, in the summer, at Thanksgiving and Christmas. The Victorian Christmas attracts people to Woodside in December and in fact was the stimulus which made December the month with the highest visitation in 1984 (8,079). Visitation dropped in December 1985 (4,733); however, due to a reduction in media coverage/publicity. The Victorian Thanksgiving had a total attendance of 1,855 from October 5 to October 14, 1985; the period of the event. Summer events such as the Victoria Day Celebration, and Victorian Garden Party and Canada Day Celebrations drew 4,050 people to grounds in 1985. It is estimated that attendance at special events accounted for approximately 12,000 people to the grounds in 1985 or approximately 30% of total visitation to the house and grounds (38,390).

Casual Visitation

Exhibit II-5 summarizes casual visitation to the park over the 1981-1985 time period. Seasonality in visitation for the casual market parallels that of total visitation to the park. Approximately 80% of people visiting Woodside are from Ontario, with the majority from the Kitchener-Waterloo area. Americans and Canadians from provinces other than Ontario, have been steadily increasing and represent 16% of park attendance; overseas visitors account for 4%.

EXHIBIT II-5


WOODSIDE NATIONAL HISTORIC PARK
CASUAL VISITORS ATTENDANCE BY MONTH
NUMBER OF VISITORS (Thousands)
0
1
2
3
4
5
6
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC
MONTHS
1981
1982
1983
1984
1985

There is little information collected or available from which to produce a profile of the casual visitor and as such, the comments that can be made are purely from observation and strictly qualitative.

The Kitchener area enjoys a large community of families of Germanic descent, as such, English and German are the most frequently spoken languages by visitors to Woodside.

In addition to visiting and touring the house, casual visitors often make use of the grounds for picnicking, recreation and relaxation. However, there is an additional visitor type specific to the parkland, the local community residents who use the park as a recreational resource.

The grounds provide a community recreation resource and are frequented by local residents. Often they are seen strolling in the afternoons and evenings through the park. Vacationers, the local residents and area business staff utilize the picnic tables during the summer months. In winter, the grounds are used by local cross-country skiers.

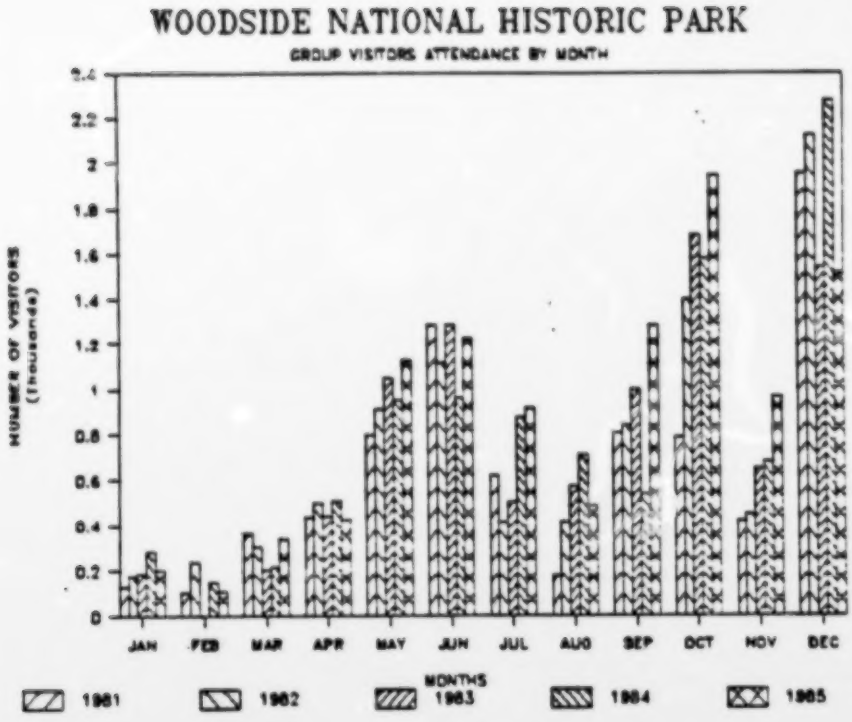
As there are currently no regular daily grounds programs, the time spent viewing the grounds is generally quite brief. However, picnicking may last from 30-60 minutes to several hours. Special events programming, i.e., June Garden Party, Canada Day Social, attract visitors for several hours during the weekend afternoons. There are no statistics available on total grounds visitation, length of stay, etc.

During the 1981-1985 time period, casual visitation to Woodside increased by 32.8%, an annual compound growth of 7.4%.

Group Visitation

The number of education and other organized group visitors attending the park are about equal. In 1985, special interest groups accounted for 22% of total group visitors, tour groups - 25%; and school groups - 53%. On an annual basis, group visitation is strongest in October and December, followed by September, November, June and July, respectively (see Exhibit II-6).

EXHIBIT II-6


WOODSIDE NATIONAL HISTORIC PARK
GROUP VISITORS ATTENDANCE BY MONTH
NUMBER OF VISITORS (Thousands)
2.4
2.2
2
1.8
1.6
1.4
1.2
1
0.8
0.6
0.4
0.2
0
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC
MONTHS
1981
1982
1983
1984
1985

Origins of group visitors are as follows: 45% from Kitchener/Waterloo, 18% from elsewhere in Waterloo Region, 19% from elsewhere in Ontario, 1% from other provinces and 16% from the United States. This represents a higher proportion of visitors from beyond the Region of Waterloo than the overall average of total visitation to Woodside.

Over the 1981-1985 time period total group visitation to Woodside increased by 33.6%, an annual compound growth of 7.6%.

School Groups

School groups tend to have a higher proportion of local visitors (67% Kitchener/Waterloo and 19% other Waterloo Region), than other group visitors. The majority of school groups come from the Waterloo County Public School Board and the Waterloo County Separate School Board. School Groups tend to revisit the park as curriculum and programs are revised. It is estimated that approximately 90% of schools return to Woodside for programs, as it occupies a specific component of the curriculum. Grades 3-4 and 8-10 are the most frequent school visitors to the park, visiting primarily in the spring and fall. However, the highest individual month for school group attendance is December; for the Christmas programs (34 groups), followed by November.

School groups take part in intensive educational programs which run two hours in length. During May and June, some school groups use the grounds as well as the house for picnicking, nature walks and outdoor games.

Special Interest Groups

Special interest groups have a strong draw from Ontario residents outside the region (42% of special interest group visitations). Specific origins include Toronto, London and Guelph as well as many of smaller centres within an hour of the site. June, July, October and December are the popular months for special interest group visits. Tour schedules for special interest groups generally consist of approximatley 20 minutes in the basement for a brief orientation, slide show and exhibit viewing, before touring the house for another 20 to 25 minutes. The tour of the house would be guided and if requested would focus on particular issues pertinent to the interests to the group.

Tour Groups

Tour groups have a strong component of U.S. and other Ontario origins (outside of the Waterloo Region), 60% and 29% of tour group visitors, respectively. October is the primary month for tour groups, perhaps as it is also a popular month for Fall Colour Tours and as it co-ordinates with Oktoberfest.

As with the special interest groups it is optimal if tour groups spend 20 minutes having a brief orientation, watching the slide show and viewing the exhibits before having a guided tour of the house. However, bus tour groups are on very limited schedules which may allow them only thirty minutes to visit Woodside. Often, this time is taken up with a brief orientation talk by the guide and a quick self-guided tour. These groups generally take advantage of the washroom facilities. As the washrooms are limited and waiting occurs, their actual house visit time can be cut down considerably.

Unrecorded Visitors

Due to the current visitor reporting mechanisms at Woodside, it is difficult to accurately track all visitation to the site. As a result, the visitation figures reflect a proportion of unrecorded visitors. The percentage of total visitation estimated as unrecorded for 1981-1985 is summarized below.

UNRECORDED VISITATION
1981 - 1985

Year	Number	*% Unrecorded
1981	5,450	18.1%
1982	5,450	15.6%
1983	5,350	15.8%
1984	5,650	14.6%
1985	5,650	14.7%

*% unrecorded represents estimates of grounds usage by Park's staff.

Source: Woodside National Historic Park
Visitor Attendance Forms 1981 - 1985

For the purposes of this analysis, it has been assumed that the unrecorded visitation is generated primarily by the casual visitor segment.

Summary

Woodside National Park has sustained an annual compound growth of 6.2% in visitation from 1976 to 1985. Based on the recorded visitors the proportion of casual visitors to group visitors has varied slightly over the past three years for an average of 70% casual visitors and 30% organized groups. School group visitors account for slightly more than 50% of total organized group visitors. In addition, visitation at the annual special events accounts for an estimated 10% of total annual visitors.

The target groups that Woodside markets to and who are currently attending the site include the following:

- the first time visitor
- the repeat visitor
- school groups
- special interest groups
- tourist (bus) groups
- special needs groups (disabled)

Other target groups that are not currently visiting the site but have such potential are the university community, and the resident "daytime" market (ie. to participate in on-going seminar or workshop sessions).

The major geographic markets for casual visitors and school groups are Kitchener/Waterloo and the Waterloo Region; for special interest groups, are Kitchener/ Waterloo, Waterloo Region and Other Ontario; and for tour groups are the major Ontario markets and U.S. markets.

As the period landscaping progresses, park visitors will naturally be enticed to spend time in the pleasant Victorian gardens. With increased outdoor interpretion and associated programming; notably special events, demonstrations, and guided walks, the potential exists to attract considerably more visitors to enjoy the grounds' resources.

Positive growth trends in visitation have been demonstrated for both the group and casual visitor market. However, it must be noted that a capacity problem is developing during the peak summer months, during special events and at special programming.

SECTION III MARKET OVERVIEW

3.1 Local/Regional Tourism and Recreation Infrastructure

In order to effectively evaluate the potential for Woodside National Historic Park, we have evaluated the facilities and attractions within the Region of Waterloo which both compete with as well as enhance resident and visitor usage at Woodside. Much of the analysis here has been drawn from the Waterloo/Stratford Tourism Masterplan prepared in June, 1985 by Pannell Kerr Forster.

General Overview

It has been estimated that over 800,000 tourists visit the Region of Waterloo on an annual basis, generating some $56 million in direct tourism expenditures. Discussions with the Kitchener Convention and Visitor Bureau indicate that 1900-2000 tour and special interest groups come to the region annually.

In 1983 and 1984 the Kitchener Convention and Visitor Bureau conducted a survey of visitors to the Waterloo Region. The results of these surveys are summarized in Exhibit III-1.

As identified from the surveys, the primary purpose of trips to the region is vacations, accounting for 68% to 78% of all trips. U.S. visitation ranges from 13% to 28% of all visitors, Ontario residents within 100 miles accounting for 37% to 58%, and Ontario residents traveling more than 100 miles accounting for 14% to 21%.

An evaluation of attractions and facilities visited indicates strong variation in terms of survey results. In 1983, 21% of all visitors went to historic attractions (Woodside representing a portion of this figure). In 1984, survey results indicated historic sites accounted for only 6% of all visitation.

It should be noted that the sample size in 1984 was only 191 visitors compared to 1,275 visitors in 1983. Therefore, the 1983 results would have to be considered more reliable. The survey was not conducted in 1985, but will be re-initiated in 1986.

EXHIBIT III-I

SURVEY OF VISITORS

WATERLOO REGION

PURPOSE OF TRIP

	Business	Vacation	Shopping
1984	4.1%	67.5%	25.6%
1983	7.1%	77.6%	12.4%

ORIGIN OF VISITORS

ORIGIN (HOME REGION)	1984 (based on 191 returns)	1983 (based on 1,275 returns)
Canada		
Ontario (-100 miles)	37.1%	58.2%
Ontario (+100 miles)	20.9	14.2
Other Provinces	14.1	5.8
USA	27.7	13.4
International	N.A.	8.2
	100.0	100.0

ATTRACTIONS VISITED

Attraction	Year 1984 (%)	1983 (%)
Kitchener Market	43.0	38.1
Shopping (Factory Outlets)	12.4	N.A.
Rural Countryside	8.9	37.1
Seagram Museum	5.5	N.A.
Fun Parks	4.9	48.5
Universities	4.3	3.2
Waterloo County Market	3.7	17.5
Oktoberfest	2.6	N.A.
Historic Sites	5.7	21.2
No Response	3.4	N.A.
Other Sites	8.4	N.A.

The Attraction and Event base in the Region was examined to evaluate Woodside's market position.

Levels of significance were defined in the Waterloo/Stratford Tourism Plan for each attraction or event in the area using the following criteria.

- **International/National** - The attraction or event has attendance in excess of 500,000 persons and draws visitation from both national and/or international levels.
- **National/Provincial** - Attendance in excess of 250,000 persons and draws visitation from provincial and/or national levels.
- **Provinical/Regional** - Attendance in excess of 100,000 persons for attractions and 30,000 persons for events and draws visitation from regional and/or provincial levels.
- **Regional/Local** - Attendance in excess of 20,000 persons for both attractions and events and draws visitation from local and/or regional levels.
- **Local** - Attendance below 20,000 persons and draws visitation from the local area level only.

Commercial Attractions Evaluation

Exhibit III-2 summarizes the various attractions in the Waterloo Region by their respective level of significance. Exhibit III-3 summarizes the relative location of each. The quality of attractions in Waterloo Region is good. A diverse base has developed, enabling penetration into a broad mix of markets. Most attractions attain strong visitation levels. Two relatively new facilites; Pioneer Sportsworld and Seagrams Museum, are receiving high levels of visitation which indicates there is market potential for expansions or new attractions.

Origin of visitation and seasonality of demand for these attractions is summarized in Exhibit III-4.

EXHIBIT III-2

WATERLOO REGION ATTRACTIONS

International/National Attractions

None

National/Provincial Attractions

African Lion Safari

Provincial/Regional Attractions

Bingeman Park
Pioneer Sportsworld
Seagram Museum
Centre in the Square Theatre
Doon Heritage Crossroads
Kitchener's Farmer's Market

Regional/Local Attractions

Chicopee Ski Centre
Elmira Raceway
Kitchener Memorial Auditorium
Woodside National Historic Park
Waterloo County Farmer's Market

Local Attractions

numerous local art galleries and university facilities

EXHIBIT III - 3

The REGIONAL MUNICIPALITY of WATERLOO

ATTRACTIONS BASE

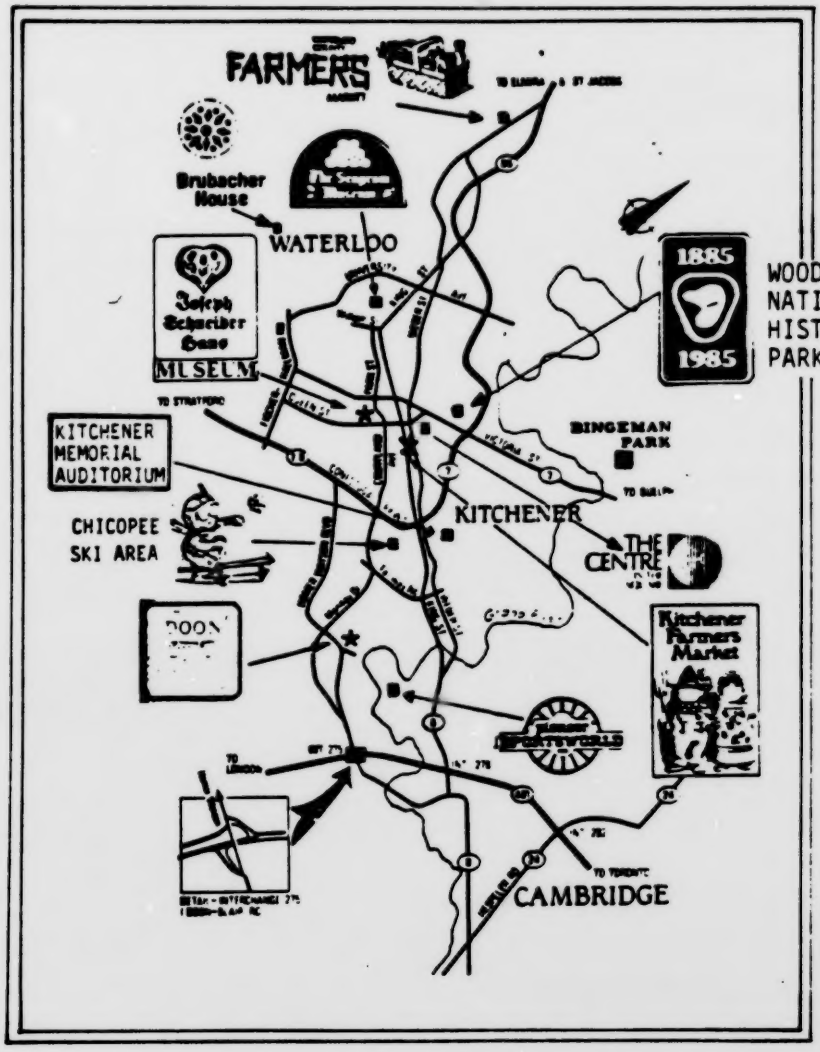


EXHIBIT III - 4
ATTRACTION VISITATION
VISITOR ORIGIN BY SECTOR

	ORIGIN	
Sector	Resident	Non-Resident
Commercial Attractions	81.0	19.0

SEASONALITY OF BUSINESS BY SECTOR

	% OF BUSINESSS				
Sector	Winter	Spring	Summer	Fall	Total
Commercial Attractions					
Local/Regional	10	32	28	30	100
Regional/Provincial	9	18	63	9	100
Total	9	20	57	13	100

Source: Waterloo/Stratford Tourism Masterplan

Overall resident demand accounts for 80% of visitation to commercial attractions in the Region of Waterloo. These figures are heavily influenced by attractions such as Bingeman Park, and Pioneer Sportsworld, which attract strong levels of resident visitation.

The data also indicates, seasonality of demand for these attractions, with the larger Regional/Provincial attractions being more heavily influenced by summer seasonality. These figures are also heavily influenced by Bingeman Park, and Pioneer Sportsworld.

Findings of the Waterloo Stratford Tourism Plan also stated that there are not enough attractions dispersed throughout Waterloo Region. This puts the Region at a competitive disadvantage with other tourism destinations such as Toronto or Niagara Falls. In addition, the Region contains only one attraction of provincial/national significance. As a

EXHIBIT III-5

WATERLOO REGION FESTIVALS AND EVENTS

International/National Events

None

National/Provincial Events

Oktoberfest

Provincial/Regional Events

Central Ontario Exhibition
Elmira Maple Syrup Festival
Mennonite Relief Sale
Wellesley, Apple, Butter and Cheese Festival

Regional/Local Events

Cambridge Fall Fair
Cambridge Highland Games
Elmira Fall Fair

Local Events

Multi Cultural Spring Festival
Sounds of Summer
Ayr BBQ Weekend
Cambridge Can Amera Games
Cambridge Antique Show
International Festival
Cambridge Kinsmen Carnival
New Hamburg Fall Fair
Wellesley Fall Fair

result, most commercial attractions generate primarily local/regional visitation. These factors combined with the seasonal operation of Chicopee Ski Centre, Pioneer Sportsworld, and Bingeman Park, further depletes the strength of this resource base for tourism.

Festivals and Events

Festivals and events currently occuring in the Waterloo Region are summarized in a manner similar to area attractions (see Exhibit III-5) and are grouped by level of significance, as identified in the Waterloo/Stratford Tourism Plan.

There is a better developed mix of events and festivals than commercial attractions by significance level and geographic location. Although Oktoberfest is the best known event, all area municipalities host at least one festival or event.

Most events occur during the summer period, however, some do occur during the shoulder periods, especially spring. There is a definite lack of winter events and activities. Several fall fairs and exhibitions overlap and cause duplication. Including the Central Ontario Exhibition, five fall fairs occur within Waterloo Region. The need for local events and corresponding local identity is important. However, this duplication limits any single event from attracting increased visitation.

Festivals and events draw much stronger from non-resident demand with almost 50% of visitation coming from non-residents, see Exhibit III-6.

EXHIBIT III-6
VISITOR ORIGIN BY SECTOR

	ORIGIN	
Sector	Resident	Non-Resident
Festival and Events	51.0	49.0

Most events are held outdoors and are thus strongly influenced by weather conditions. The time required to plan and co-ordinate each event necessitates that they must occur at the planned time, despite the weather. As a result, attendance levels vary significantly due to weather conditions.

Overall, evaluation of the festival and event base suggests that Waterloo Region has to be considered one of the best developed areas for festivals and events in the Province. There is, however, a potential for a winter carnival or event to offset seasonality factors.

Summary

Woodside National Historic Park, with annual visitation approaching 40,000, would be classified as a regional/local tourist attraction. As a historic resource, Woodside is of national significance, and forms part of the overall tourist attraction base in Waterloo Region.

Due to strong on-site programming, the seasonality of demand at Woodside is not as varied as at other attractions in the region. In addition, while figures are not readily available for casual visitors, group visitation data suggests an already stronger tourist draw than other regional/local attractions.

Woodside's current market position suggests strong potential for development of a visitor centre on site. Two factors which will strongly influence this potential are:

1) The development of a visitor centre would permit more special events and programs, allowing for increased visitation during the shoulder seasons, and stronger levels of non-resident visitation.
2) From a tourism development perspective, a visitor centre would increase the attractiveness of Woodside and thus improve the tourism infrastructure of the Waterloo Region. As a result, Woodside would not only attract more visitors to its site, but would also have the potential to increase visitation to the region as a whole.

3.2 Analysis of Comparables

Introduction

The analysis of comparables consisted of an evaluation of Canadian and American parks and sites which operate with the level of facilities and amenities proposed for this project and/or those which possess similar historic resources of national significance. These comparable parks, attractions, facilities and uses have been evaluated in terms of the potential for Woodside National Historic Park. This research provides assistance in determining the specific market segments which Woodside could attract, and aids in assessing operational aspects of these facilities which relate to the present operational concerns at Woodside. For the purpose of this study these comparables have included:

1. Monticello, Charlottesville, Virginia
   - Home of America's third president, Thomas Jefferson
2. Bell Homestead, Brantford, Ontario
   - Home of telephone inventor, Alexander Graham Bell (1871)
3. Dundurn Castle, Hamilton, Ontario
   - Home of Sir Allan Napier McNab (1850)
4. Gibson House, Toronto, Ontario
   - Restoration of David Gibson House (1851)
5. Mount Vernon, Mount Vernon, Virginia
   - Home of George Washington (1799)
6. Belleville House, National Historic Park, Kingston, Ontario
   - Home of Sir John A. McDonald (1848 - 1849)
7. Hildene, Manchester, Vermont
   - Descendent's of Abraham Lincoln's home
8. Louis St. Laurent, National Historic Park, Compton, Quebec
   - Home of Louis St. Laurent, former Canadian Prime Minister
9. MacKenzie House, Toronto, Ontario
   - Home of William Lyon Mackenzie, first Mayor of Toronto
10. Bethune Memorial House, Gravenhurst, Ontario
    - Home of Norman Bethune, famous Canadian Doctor (1890-1939)

11. Stratford Hall Plantation, Stratford, Virginia
    - Birthplace of General Robert E. Lee
12. Sir Wilfred Laurier House, Ville-des-Laurentides, Quebec
    - Home of Sir Wilfred Laurier (1841-1919)
13. Joseph Schneider Haus, Kitchener, Ontario
    - Living Museum of the 1800's
14. Doon Pioneer Village, Kitchener, Ontario
    - Re-creation of authentic Pioneer Village depicting the early days of Waterloo County
15. The Seagram Museum, Waterloo, Ontario
    - Museum re-creating the history, technology and romance of the distilling industry

General Site Information (Exhibit III-7)

All historic sites surveyed have, as the main resource, the home of an important personality, generally of national Canadian or U.S. significance. Most of the homes are original while some have been reconstructed from original materials, none are reproductions. All are quality attractions and tend to be located in close proximity to major population centres. Although most sites operate year-round, one closes for the winter and another closes for six weeks in March and April. Generally, the hours tend to be shortened for public touring in the off-season, although organized tours are given as requested by appointment.

The sites surveyed in Canada are operated either by Parks Service or by the municipal government in the city in which they are located. In the United States, sites are operated by foundations and associations which operate without government funding. All comparables charge admission with the exception of National Historic Parks, the Seagram Museum and Bell Homestead in Brantford. However, with the introduction of the telecommunications museum in Brantford, where Bell Homestead is located, the possibility of charging admission has been considered. It is interesting to note that the admission fees charged by the comparable sites in the U.S. are significantly higher than the admission fees charged in Canada; however U.S. sites tend to be larger and have more developed facilities to justify the difference.

On Site Facilities (Exhibit III-8)

The parks considered to be comparable are developed around an historical residence of provincial or national significance. The U.S. sites tend to offer a wider range of facilities and activities as the properties are physically much larger and originally had many more buildings on site (due to a higher level of original affluence) than the Canadian sites.

In addition to the main houses which offer rooms to view, and feature period restoration, furnishings and artifacts, often original, many sites offer some type of visitor service facility. In many cases, this facility is in the form of a visitor centre occupying an original or reconstructed building on the site; however, it may occupy part of the main house. Administrative functions such as fee collection and general administration are also usually located in the visitor facilities. Of the sites interviewed to date, only three do not have a specific visitor service facility:

- Monticello, The Home of Thomas Jefferson, does not have any orientation facility but a centre catering to the Interpretation of Thomas Jefferson's life is under construction proximate to the site. Monticello is hoping that visitors will tour this facility and then proceed to their site.
- Dundurn Castle, The Home of Sir Allan Napier McNab - four of the castle guest bedrooms are current being used for display purposes. This is not comprehensive enough for site orientation, and disrupts proper interpretation of the castle. A proper visit orientation centre is desired.
- Mount Vernon, The Home of George Washington, does not have a visitor orientation centre, and in fact, would like to offer more interpretation but is limited due to the size and layout of the building.

Most sites undergo continual restoration and upgrading in order to improve facilities and services, repair existing facilities and restore additional facilities for interpretive purposes. Bellevue National Historic Park and Bell Homestead have added their visitor centres within the past 5 years. Neither of these visitor centres is in the form of an authentic period building.

As ongoing projects, both Mount Vernon and Monticello are in the midst of archeological excavations to uncover the foundations of original structures, no longer standing, however, neither site has plans to reconstruct the identified buildings.

Other on site facilities often include an administration area, washrooms, and original outbuildings which are open and on display. All sites include gift shops or sales area except for the sites operated by Parks Service. The gift items sold are generally restricted to products that reflect park theming. In a few cases, a residence is provided on the grounds for the site director, and in the case of Stratford Hall, five staff residences are on site.

In terms of planned renovations or additions, few sites have any plans. Of those that do, making the site more accessible to the disabled is a priority (Monticello, Gibson House). Plans at Mount Vernon entail replacing the existing lighting system with a more indirect form of light that will make the interior brighter in the late afternoon.

Visitor Service Facilities and Programs (Exhibit III-9)

The Visitor Service Facilities at the comparable historic sites generally include a collection area for groups, fee collection, theatre, exhibit areas, information on park programs, gift shop or sales area, and washrooms. The exhibit areas include picture boards, display cases housing artifacts and community exhibits that rotate on a regular basis. The theatre provides an audio visual slide or film display, however, Louis St. Laurent National Historic Park, Quebec has a multi-media presentation that maximizes the orientation experience by presenting 70% of the parks theming.

At many of the sites a portion of the exhibit area rotates a minimum of 2 to 3 times per year. This provides an incentive for repeat visitation and provides subject matter for press releases.

Visitor Service Programs vary slightly from site to site depending on the type of site and its resource base. However, there are some common programs. Guides or interpreters generally wear a costume presenting a restoration of the site and a uniform if presenting a preservation of the site. Monticello has neither a costume or uniform but requires guides to wear business attire and name badges.

A guided tour by an interpreter and/or a self-guided tour, is available at each comparable property. Where there are self-guided tours, generally interpreters are stationed in the various rooms of the house to answer questions and point out facts of interest. All sites identified that a guided tour provides better interpretive value than the self-guided tour and maximizes the visitor experience. However, due to the layout of the house and manpower available, a guided tour is not always feasible, particularly during the peak season.

All sites provide guided tours to pre-booked organized groups. These tours tend to be developed in accordance with the age group, interest and level of understanding of the particular group.

Many sites offer special programs for school groups. These programs generally include an educational kit sent to the teacher prior to the visit to assist in class preparation a choice of several pre-designed programs or a customized program and a guided site tour, with animation and demonstrations. Students are seen as a key demand segment and those sites without a structured school program (Bell Homestead, Bethune Memorial House and Louis St. Laurent National Historic Park) are anxious to implement one.

Gibson House and Dundurn Castle, both municipally owned and operated, offer special workshops for adults and children. Both sites identify these workshops as their most successful programs; moreso than their special events. Generally the programs are 1/2 day in length and a fee is charged to cover costs. The children's programs are very "hands-on participatory" and include cooking, crafts, and period games. In fact, Dundurn Castle's most successful program is its children's program "Life of a Servant." The adult programs are also participatory but rely to a greater extent on lectures and verbal descriptions (an example would be "Victorian Garden Flower Arranging"). Both sites find these to be successful because of the small group size, more personal attention and thus, maximum interaction.

The sites that do not have programs as those previously discussed, but do have special events, identify the special events as being their most successful programs. Most sites have an event at Christmas time. Other events are coordinated with statutory holidays, and are dependent on the historic resource, theming and available financial resources.

Those sites that had neither workshop programs nor special events, had difficulty identifying successful programs.

Other programs desired included in-school programs, and programs which would provide maximum site and theme orientation and interpretation. The type of programming desired is participatory and, as identified by Gibson House - "...more visual, presenting living history and process in the regular visitor programming."

Analysis of Demand (Exhibit III-10)

Attendance at comparable sites is reflective of many factors; the size of the site, the resource, quality of facilities and programs offered as well as proximity to and size of the resident population base. The parks with the highest level of visitation are in the United States and have the largest land area of the comparable sites surveyed. Sites with resources and visitor facilities similar to those envisaged for Woodside have visitation levels ranging from 13,000 at Gibson House to almost 60,000 at Bellevue National Historic Park.

School groups tend to visit the comparable sites primarily in May and June, however, depending on the type of program they are taking advantage of and where it fits into the course of study, visits also occur in the fall and winter. Tour groups tend to visit comparable sites in the late spring, summer and fall (while on colour tours), however, this segment provides some demand throughout the entire year. Casuals and families tend to visit primarily in the summer months and maintain a minimum level of demand throughout the rest of the year.

The summer months typically enjoy the highest levels of demand followed by the fall, spring and winter respectively. December, however, is often one of the highest months for visitation due to special events and Christmas programming.

School groups visiting the sites are generally at primary levels although there appears to be an increase in the number of high school students. Some sites have been able to effectively become included in the curriculum. For example, every grade 8 class in

Hamilton has a trip to Dundurn Castle included in their curriculum. The tour group market consists of a significant number of senior citizens, and special interest groups are generally associations or clubs that relate to antiques, history, preservation, etc.

The larger the resident population in proximity to the site, the larger the ratio of residents to visitors. For example, Mount Vernon, which is located 16 miles from Washington, D.C. has largely local visitation, while Bell Homestead, in Brantford has 25% resident population and 75% visitors. Overall, there is a higher proportion of casual and family visitation than organized groups.

Operating Information (Exhibit III-11)

Marketing activities for the comparable sites are similar. However some sites take a fairly aggressive approach and as such, have some unique ideas. Similar marketing activities that most sites engage in, include:

- distribution of brochures
- inclusion in Ministry of Tourism and Recreation or Tourism Association literature
- membership in local and tourism organizations/associations
- advertising/publicity in local newspapers

Other marketing techniques employed by a few sites include:

- attend trade shows (i.e. National Tour Association)
- regular speaking engagements - site director
- direct mail
- flyers to local community centres/library
- public service announcements on television
- radio interviews
- personal invitations sent to media for special events

The number of employees at the comparable sites varies greatly due to the size of the sites and the levels of visitation. Generally, staff falls into the categories of management, administrative, interpretive, and maintenance. Additional staff related to

specific activities is required where those activities exist, for example, a gift shop. In the case of a municipally operated site, the local parks and recreation department generally maintains the grounds.

In addition to paid staff, Gibson House in Toronto benefits from a successful volunteer program. The North York Historical Society operates the volunteer program involving its members. They are self-directed, conduct their own training, and provide their own costumes. Generally, there are two volunteers on at all times. They greet visitors, help conduct tours when required, and work in the gift shop.

The primary concerns of the sites surveyed include orientation, programming and the visitor experience. Most sites would like to provide a better orientation to visitors than they currently offer. However, they are often limited by space and resources. Increasing the programming they offer in terms of school programs and special programs for children and adults is also desired by the sites.

The capacity of facilities was also a cause for concern as facilities function above capacity during the peak summer months and special events; and below capacity at all other times. If the demand could be balanced, it would provide better utilization of the facilities. By providing an effective orientation program, a variety of special programs and by avoiding over-crowding, the visitor experience would be maximized. This is of utmost importance as providing a good visitor experience is a mandate of historical sites.

Summary

The sites surveyed that have a visitor/administrative facility feel that it is an integral part of their resource in terms of providing orientation, interpretation and other visitor services. It allows for presentation of the theming of the site and interpretation prior to touring the house through displays, exhibits, audio visual presentations, literature and verbal presentations. This permits a better understanding when the visitor tours the house and identifies to the visitor the significance of the artifacts, the furnishings, the site and ultimately the personality in question. The visitor services provided include a place for groups to congregate, washrooms, fee collection, gift shops and, at some sites,

multi-functional rooms where special programming can take place. Such services aid in alleviating congestion, provide visitor comfort, providing a range of functions to provide a well-rounded, maximized visitor experience that will not end when the visitor leaves the site.

The sites that currently do not have a visitor/administrative facility are experiencing operational problems and concerns with respect to orientation, programming, and congestion. It can be suggested that a visitor/administrative facility at Woodside would provide relief in these areas.

Woodside, with attendance approaching 40,000 visitors annually, draws as well as most of the Canadian historic homes evaluated. While the U.S. comparables outdraw all the Canadian examples this is due primarily to the population base from which they can draw and the level of facilities which they have developed.

3.3 Market Position

Woodside can be evaluated both as an attraction and as a Historical resource. This section of the report addresses Woodside's current market position as an attraction within Waterloo Region and as a resource compared to similar historical resources in North America. The potential market position that Woodside could achieve with the addition of a visitor centre, both as an attraction and as a resource is also presented.

Tourism-Market Position

The levels of visitation that Woodside enjoys and the proportion of group visitors from Kitchener and Waterloo Region, identify it as a regional/local attraction. The attractions that Woodside shares this position with include Chicopee Ski Centre, Elmira Raceway, Kitchener Memorial Auditorium, Joseph Schneider Haus and the Waterloo Farmer's Market (Waterloo-Stratford Tourist Plan, 1985). All of these attractions have annual attendance in excess of 20,000 persons and draw visitation from local and/or regional levels.

Due to strong on-site programming, the seasonality of demand at Woodside is not as critical a factor as at other attractions in the region. In additon, while figures are not readily available for origin of casual visitors; group visitation data, suggests a stronger tourist draw than the other attractions Woodside shares its tourism market position with.

While the primary benefits of development of the visitor/administration building, Woodside's current market position suggests strong market potential for development of the building on site. Two factors which will strongly influence this potential are:

1. The development of a visitor/administrative building would permit more special events and programs, allowing for increased visitation during the shoulder seasons, and stronger levels of non-resident visitation.

2. From a tourism development perspective, a visitor/administrative building would not only increase the attractiveness of Woodside but it would improve the tourism infrastructure of the Waterloo Region.

Historic Resource - Market Position

As a historic resource, Woodside has a very significant market position. Woodside has both national and historic significance, a combination enjoyed by few historic homes. Sites that have similar stature include primarily those operated by Parks Service; having previously been homes of Canadian Prime Ministers, such as Sir John A. McDonald, Sir Wilfrid Laurier and Louis St. Laurent. There are other historic sites which have a great deal of national significance but these tend to be "military" oriented, such as Fort York and therefore occupy a comparable while different market position than the resource at Woodside.

Data from the comparables indicates that the development of a visitor/administrative facility leads to the alleviation of operational constraints and allows improved interpretive programming.

EXHIBIT III-7

COMPARABLE SITE ANALYSIS

GENERAL SITE INFORMATION

Name of Site	Location	Contact/ Title	Operated by	Year Opened	Description of Historical Resource	Operating Season	Hours of Operation	Admission
Monticello	Charlottesville Virginia, U.S.A. tel: (804) 293-2158	Milly Travis Public Affairs Officer	Thomas Jefferson Memorial Foundation	1925	Home of America's third president, Thomas Jefferson	Year-round (except Christmas day)	Nov 1-Feb. 28 9 am - 4:30 pm Mar 1-Oct 31 8am-5 pm	Adults $5.00 Sr. Citizens $4.00 Children $1.00 Students $1.00
Bell Homestead	94 Tutela Heights Road Brantford, Ontario tel: (519) 756-6220	Mr. Stusher Curator	City of Brantford	1910	Home of Alexander Graham Bell, inventor of the telephone - presents theme's of his family and the years they spent in Brantford (1870 - 1881)	Year-round (except Christmas day)	April to Oct. 10 am - 6 pm Nov. - March 10 am - 5 pm (Closed Mondays)	Free
3. Dundurn Castle	Dundurn Park on York Blvd. Hamilton, Ontario tel: (416) 522-5313	Terry Bartlett Manator	City of Hamilton	1967	Sir Allan Napier MacNab's home - upper middle class Victorian era 1855-gentleman's house with servants quarters	Year-round (except Christmas day and New Years Day)	Mid-June to Labour Day 11 am-4 pm Sept.-June 1 pm - 4 pm Do conduct tours outside of public hours by appointment	Adults $4.75 Sr. Citizens $2.40 Disabled $2 Students $1.50 Children 9up Family $6.75
4. Gibson House	5172 Yonge Street Toronto, Ontario tel: (416) 225-0146	Christine Castle Curator	City of North York	1971	1851 restoration of David Gibson's House (land surveyor/politican) -house reflects successful middle class professional house of 1855	Year-round (except: Dec. 24-26, New Years Day and Good Friday)	Weekdays 9:30 am - 5 pm weekends/ Holidays Noon-5 pm	Adults $1.50 Sr. Citizens 75¢ Students $1.25 Children 75¢ Family $3.50
5. Mount Vernon	Mount Vernon, Virginia U.S.A. 22121 tel: (703) 780-2000	Jim Rees Director	Mount Vernon Ladies Association of the Union	1858	George Washington's home preserved as it was in 1799, the year he died. Mid-Georgian architecture.	Year-round	March - Oct. 9 am - 5 pm Nov.-Feb. 9 am - 4 pm	Adults $4.00 Sr. Citizen $3.50 Children $2.00 Group - reg. rate - group leader free
6. Bellevue House National Historic Park	35 Centre Street Kingston, Ontario tel: (613) 542-3858	Edward Friel Curator	Parks Canada	19o7	Home of Sir John A. Macdonald, P.M. of Canada 1844-1849. Italian style villa features broad overhanging eaves, decorative balconies, and a square central tower.	Year-round (except statutory holiday from Labour Day to end of May	June - Sept. 9 am - 6 pm Sept. - May 10 am - 5 pm	Free
Hildene	Manchester, Vermont U.S.A. tel: (802) 362-1788	Clair Schoffstall Vice President Programming	Friends of Hildene Inc. -non-profit organization		412 acre estate where Abraham Lincoln's son and direct descendents lived until 1975 - Classic 24 room Georgian manor house. Interior has been preserved in tact with original furnishings and personal effects of the family	Mid May to first Sunday in November. Special groups by appointment. Re-opened for 3 days between 5:00-9:00 p.m. Christmas and New Years. Open as a cross-country ski facility in winter.	9:30-5:30 (last tour at 4)	Adults $5.00 Children $2 Group $3.00 (10+ $4.50)
8. Louis St. Laurent National Historic Park	6 Principale Street Compton, Quebec tel: (819) 835-5448	France Provencher Superintendent	Parks Canada	1982	Home of Louis St. Laurent Prime Minister of Canada & General Store operated by his father - 98% of of house furnishings (2000 items are original)	Year-round except for 2 weeks at Christmas and 6 weeks April 1 to mid May. Open to public on weekends only in winter and Wed. to Sunday, in spring and fall, but available for organized groups at all times.	July & August 10 am - 5 pm All other times 1 pm - 5 pm	Free

EXHIBIT III-7 continued

COMPARABLE SITE ANALYSIS

GENERAL SITE INFORMATION

Name of Site	Location	Contact/ Title	Operated by	Year Opened	Description of Historical Resource	Operating Season	Hours of Operation	Admission
9. MacKenzie House	82 Bond Street Toronto, Ontario tel: (416) 595-1567	George Waters Toronto Historical Board	City of Toronto	1960	Home of Wm. Lyon MacKenzie, Toronto's first mayor and leader of the Rebellion of 1837	Year-round except for Good Friday, Christmas & Boxing Day	Mon-Sat. 9:30 am-5 pm Sun - noon to 5 pm	Adults $1.50 Children & Sr. Citizens $1.00
10. Sir Wilfred Laurier House National Historic Park	Ville-des-Laurentides, Quebec tel: (514) 439-3702	Anne Marie Collins Superintendent	Parks Canada	1941	Historic Home of Sir Wilfred Laurier decorated with period furniture (1840-1850) and 1500 artifacts	Mid-May to Labour Day - Labour Day to Mid-October and April to Mid-May October to April	9:00 -5:00 7 days 9:00-5:00 Saturdays & Sundays by appointment	Free
11. Stratford Hall Plantation	Stratford, Virginia tel: (804) 493-8038	Elizabeth Laurent, Curator	50 Board of Directors 1 from each state	1936	Historic home of General Robert E. Lee built in 1725. It's solid architectural style sets it apart from all other colonial homes	Year round except for Christmas Day 7 days per week	9:30 - 4:30	Adults $3.00 Children under 12 $1.50 Seniors $2.00
12. Bethune Memorial House	Gravenhurst, Ontario tel: (705) 687-4261	Mary Ellen Corcelli Interpretive Supervisor	Parks Canada	1976	Restored 1870's Presbyterian Manse and Historic Home	Year round Sept 1-June 1 June/July/Aug	10:00-5:00 9:00-6:00	Free
13. Joseph Schneider Haus	Kitchener, Ontario	Susan Burke Curator	Waterloo Regional Heritage Foundation	1975	Living museum of the 1800's	Year round (except Christmas Day, Boxing Day, New Year's Day)	May 24-Labour Day, 10:00-5:00 Labour Day - May 24 Wed. - Sat. 10:00 - 5:00	Adults $1.25 Seniors 75¢ Students 75¢ Children 50¢ Family $3.25
14. Doon Pioneer Village	Kitchener, Ontario	Martin Lewis		—	Early day village of the Waterloo County	May 4-Dec. 31	May-Sept.30 Daily 11:00-4:30 Oct. 1-Dec. 31 11:30 - 4:30	Adult $3.50 Senior $2.00 Stud. $1.50 Child $1.00 Family $8.50
15. The Seagram Museum	Waterloo, Ontario	Len Gamache Public Relations/ Marketing	Non-Profit Organization Supported by the Seagram Organization	-	Museum re-creating the history, technology and romance of the distilling industry	Year Round (closed Mondays)	Tues.-Sat. noon-5:00 Sunday noon - 5:00 Group tours by appointment.	Free
16. Woodside	Kitchener, Ontario tel: (416) 742-5273	Jane Humphries Area Superintendent	Parks Canada		Historic Victorian home of Mackenzie King	Year-round	9 a.m.-6 p.m. June 1-Labour day 10 a.m.-5 p.m. All other months Closed on statutory holidays in the winter.	Free

EXHIBIT III - 8

COMPARABLE SITE ANALYSIS

ON-SITE FACILITIES

Site	Property Size	On-Site Facilities/Use	Renovations/Additions in Past 5 Years	Planned Renovations/ Additions
Monticello	several hundred acres	• Original mansion (9 rooms) + 2 dependencies • Original weavers cottage - business office/ gift shop • New - Directors House • New - Ticket Office/Shuttle Station • Original Stable • New - Gatekeepers house - office • New - Warehouse for gift shop	• Built ticket office/shuttle stn. • Archeological dig underway (10 year project) to uncover foundations of several buildings - no plans for reconstruction	• on-going archeological excavation • Trying to make site more accessible for disabled - especially washrooms
Bell Homestead	13 acres	• Original House (10 rooms) • Visitor Centre - theatre, display area, gift shop, administration offices, storage • Original Carriage Barn - cutters and carriage on display • Original - First telephone business office - display • New - Washroom Building • New - Residence Cottage for Curator • Parking for 50 cars and bus loop	• Built Visitor Centre in 1983	• Continual upgrading and general repairs (ie. roof)
Dundurn Castle	7 acres	• Original Castle - includes gift shop and 4 exhibit rooms, administration, washrooms • Summer Cockpit Theatre	• None	• No
Gibson House	5 acres	• Original House (10 rooms) • New wing attached to house - 2 exhibit galleries, gift shop, office, collection area and washrooms • 9 car parking lot	• 1980 - Basement under house has modern kitchen, storage and office space	• Will be having a feasibility study done to assess the requirements for remodelling the wing to make it accessible for the for the handicapped
Mount Vernon	64 acres	• Original Mansion (14 rooms) • Original Brick Green house and slave quarters - museum explaining architectural development and restoration • Restaurant • Snack Bar • 2 gift shops • underground washrooms • parking lots • Administration Building (orientation and study area for special groups) • 12 out buildings - 9 of which are open to the public • Museum	• Continually - 1985 re-did the cupola as it was not proper for the year 1799 • in the midst of a 10-year archeological dig	• Lighting system - replacing with a more indirect form a light that will make the interior brighter in the late afternoon
Bellevue	2-1/2 acres	• Original House - build 1835-1840, restored to 1848-1849 period • New - Visitor Centre - extensive exhibit on Macdonald's life and career - theatre for audio-visual presentations • Garden - fruits, vegetables and herbs grown at the time the Macdonalds occupied the the house	• 1982-1983 - construction of Visitor Centre - installation of new exhibits - exhibits from house transferred to Visitor Centre - refurnishing three rooms in house • Installation of basement	• No
Holdene	412 acres	• Original Manor House (24 rooms) • Original Carriage Barn - Visitor Centre - exhibition area with permanent exhibits - mini theatre/gift counter/fee collection • Original Gazebo • Nature Trails - 2 - Walking/Cross country skiing • Picnic area	• Currently restoring formal gardens	• Continual upgrading • Presently redoing theatre and slide show
Louis St. Laurent National Historic Park	1.2 acres	• Original house - 6 rooms open to public on ground floor • upper level houses offices • General Store - original - where visitors enter • Store Warehouse - new multi-media presentation on Louis St. Laurent and Parks Canada • Shed - reconstruction - Visitor Centre washrooms, multi-function room, documentation, exhibit area, display area, work room for maintenance	• moved office space from first floor of house to second floor	No
MacKenzie House	1 lot	• Remains of original rowhouse - 7 rooms • Some of the original furnishings plus furnishings from time period • Attached wing houses a gallery with changing exhibits • Re-creation of Wm. Lyon MacKenzie's original printshop.	• Not in terms of capital costs • Landscaping improvements • Garden space added	• Continue to improve the area surrounding the house

[redacted]

SHEET B-6 continued

COMPARABLE SITE ANALYSIS

ON-SITE FACILITIES

Site	Property Size	On-Site Facilities/Use	Renovations/Additions in Past 5 Years	Planned Renovations/ Additions
10. Sir Wilfred Laurier House	2 acres	. 2 storey Historic Home (20' x 30') . Interpretive Centre (20' x 15') - static display . Outside grounds - recreated period gardens	. None	. Have cancelled plans to update Laurier display and addition of multi-functional room
11. Stratford Hall Plantation	1600 acres	. Great House - Original . 4 Dependencies - Original . Kitchen/school house/laundry/undesignated . 2 slave quarters - original . stable- original . 50 log cabins for Board of Directors . 2 guest homes . dining room . reconstructed mill . greenhouse . council building . 5 staff homes . reception centre- museum/library/slide show/ auditorium	. Research library is 5 years old . Restorations to staff homes	. No
12. Bethune Memorial House	1 acre	. Historic House . Visitor Centre	. ongoing maintenance . visitor centre opened in 1980	. Possibly
13. Joseph Schneider House	4&8 acres	. re-stored original house	N/A	N/A
14. Doon Pioneer Village	60 acres	. small town general store . Railway station . settler's homes . restored buildings such as schoolhouse and church	N/A	N/A
15. The Seagram Museum	N/A	. museum created From a melding of an 1868 distillery warehouse and an exhibition area	N/A	N/A
16. Woodside	11.5 acres	. 2 storey historic Victorian home . originally constructed - 1853 . restored to 1890's . outside grounds	. None	. See Area Development Plan, March, 1983

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EXHIBIT III-9

COMPARABLE SITE ANALYSIS

ANALYSIS OF VISITOR SERVICE FACILITIES AND PROGRAMS

	Visitor Service Facilities	Description of Visitor Orientation	Description of Other Visitor Service Programs and Activities	Description of Special Events	Most Successful/ Unsuccessful Programs	Other Programs You would Like to Implement
Monticello	—	• Visitors arrive at site, pay admission and take shuttle to house. There, the visitor is greeted and taken on a 20-25 minute guided tour • Upon leaving the house, the visitor is given a detailed brochure with a map and encouraged to go on a self-guided tour of the grounds	• Guides do not wear costumes or uniforms but rather business attire and name badges • Educational tours are are preceeded by an educational kit sent to the teacher for preparation • Tours are geared to age group and interest levels of visitors	• Wreath laying ceremony Apr 13 • Annual Naturalization of new citizens, July 4 • Candlenight Christmas Open House 3 days • Private Special Events upon request	• Successful - special events	• need orientation program but new visitor centre down the road will provide this • expand school program
Bell Homestead	Visitor Centre • Theatre (film, VCR, slides' (15 minutes long runs every 1/2 hr) • display area • gift shop • administration offices • storage	• Guides conduct tours when possible, otherwise; guides are stationed throughout the house & visitors take a self-guided tour • visitors are encouraged to go through visitor centre first	• Guides wear uniforms - blue blazer with white white shirt or blouse, blue pants or skirt	• Annual Christmas Open House (Weekend) • Highland Games have pipe band from Boston Mass, a few days before Brantford Highland Games begin • 1985-75th anniversay party -one time event	• Successful - special Events	• Working to set up dances during Brantford's annual event "International Villages" • Children's programs • Research library facility for educational purposes
Dundurn Castle	• Display area in castle - 4 guest bedrooms converted to exhibit space - changed 4 times per year	• Visitors enter back hall, met by interpreter, given a brief outline of castle, pays admission • Guided tours are given October to May • June - Sept. - given map and escorted to front hall from where visitors depart on a self-guided tour - guides are stationed in various rooms to answer questions	• Guides wear costumes of the period • Tours are geared to the group • Children Programs - 1/2 day - hands-on crafts/ cooking $3-5 • Adult Programs - 16-32 hours - $30-40 • Summer Cockpit Theatre Theatre - daily show geared to children • Education Program - booklet and 6 program options	• Herb and Spice Festival 4 days in August • Victorian Garden Party - 2 days • Christmas-month of December - open 3 evenings a week - candlelight tours - decorated in natural greenery	• Successful - children and adult programs, esp. children's program "Life of a Servant"	• Outdoor interpretation • Visitor Centre - distribute information, initiate programs from centre, provide orientation, give seminars, house admin. offices which are currently in castle
Queen House	• Attached wing to house • 2 exhibit galleries (changed 2-3 x year) • gift shop • administration office • collection area • washrooms	• At entrance, greeted by a costumed guide at a desk, advised of the building, pay admission and go into building where greeted by an interpreter and received guided tour (all visitors receive guided tour)	• Guides wear costumes of the period • School program-4 options to choose from • Adult workshops - lecture and participatory $5 - 1/2 day • Children's workshops hands on participatory $ 5 - 1/2 day • Lunch time lecture series • Membership program	• Spring Picnic • Strawberry Social • Fall Festival • Country Christmas • Hogmanay • Heritage Day • Victorian Garden	• Successful - Smaller special interest groups programs and workshops • Unsuccessful - lunch time lecture series	• more visual not verbal orientation • outreach programs • more living history - more process in visitor programming
Mount Vernon	• No orientation to mansion • Brick greenhouse and slave quarters are a museum which explains the architecture and restoration of the mansion	• Visitors are given a map and brochure upon entry and must proceed alone for a self-guided tour • Interpreters are posted in every room of the mansion and some are outside as well	• Guides wear uniforms • Guided tours provided for special groups only i.e. VIP's • Educational Program just started in 1985 - geared to social studies and includes pre-program kit for teacher and guided tour at the site. • Scholarly seminars upon request.	• No special events	—	• Further develop school programs • More scholarly seminars -research on George Washington - give seminars at site on regular basis.

EXHIBIT III-9 continued

COMPARABLE SITE ANALYSIS

ANALYSIS OF VISITOR SERVICE FACILITIES AND PROGRAMS

Site	Visitor Service Facilities	Description of Visitor Orientation	Description of Other Visitor Service Programs and Activites	Description of Special Events	Most Successful/ Unsuccessful Programs	Other Programs You Would Like to Implement
6. Bellevue	Visitor Centre • exhibit area • theatre (AV presentations)	• Guides in period costume greet visitors and give tours when possible - otherwise visitor has self-guided tour	• Guides wear period costumes • Guides provide animation i.e. cooking • Do not have special events and programs - the terminal date of the house is 1868 - a time of few celebrations	• No special events except during centennial	—	• Would like to increase school groups in the off season
7. Hildene	Visitor Centre (old carriage barn) • exhibit area • mini theatre • gift counter • fee collection • gazebo • picnic area • nature trails	• Visitors enter Visitor Reception Centre and view exhibits until a group gathers • Uniformed guides show a 13 minute slide show then proceed on a 45 minute to 1 hour guided house tour • After tour, led to an exhibit building and gardens where they are encouraged to view on their own	• Guides wear white polo shirts with Hildene crest and green wrap skirt. Uniform is optional for fair volunteers • Cross country centre in winter - lessons and rentals available • Events held each weekend	• Volunteer Recognition Days - tea & award presentation at end of season • Candlelight Christmas Tours Open house for 3 days between Xmas & New Years • Weekend Special Events ie. horse-shows, polo matches craft show, antiques	• Successful - Candlelight Tours attract 5,000 people over 3 evenings • Craft Event attracts 7,000 people in 3 days	• Educational Programs Maple Syrup Operation
8. Louis St. Laurent	Shed/Visitor • washrooms • multi function room • documentation • exhibit area • displays • work room Warehouse • multi-media show General Store • documentation	• Visitors enter general store first and are greeted at the first counter and receive background on the site. Casual visitors then go on a self-guided tour which would encompass Visitor Centre, multi-media show (presents 70% of site interpretation), and house • Organized tours receive guided tour • Guides are stationed throughout to answer questions	• Guides wear uniforms • Organized groups given conducted tour • Working on school program • Plays - July-August - 2 plays on Compton and eastern trips put on twice daily - 25 minutes each - on lawn, with park benches around	• No special events	—	• School program which would work with teachers to provide pre-visit materials • Participatory programs involving children and adults of Compton - perhaps centering around general store as an interpretive experience as this used to be a gathering area
9. MacKenzie House	• Gallery with changing exhibits	• Guides in period costume greet visitors at entrance. Tour guides orients visitor in the parlour on the 1st floor. • 2nd floor is self-guided • Person on staff in the kitchen explains the wood stove etc. and answers questions • Printshop located behind gallery where the printer demonstrates his trade and answers questions	• Interpretation Programs include craft demonstration operating kitchen and print shop. • Education programs include "Household Helpers" • A hands on program where children participate in rug hooking, making cookies, printing and/or household chores • "Full participation" program operates from 10 am to 2 pm with a a maximum of 16 participants. Children make their own lunch on the woodstove and print in the printshop.	• Victorian Christmas -largest event • Robbie Burns Day - held on the weekend closest to Jan. 25. • Scottish food, music & poetry • Gas light Festival -held on March 6- Toronto's birthday -open in evening -use gas light fixtures	• Victorian Christmas has been the most successful • However, a number sites are now offering a Victorian program - becoming difficult to compete	• Concentrating more on daily programs rather than special events. Offering every visitor a chance to view craft demonstrations, cooking, printing, etc.
10. Sir Wilfred Laurier House	• Interpretive Centre	• Visitors go on self-guided tour of interpretive centre • Costumed guides of the period give a guided tour of the house	• Educational School Programs May & June • Walking tour in conjunction with the Municipality	• Summer Weekends - crafts and craft shows • Traditional activities based on participation • Laurier - era seminars	• Successful Traditional programs involving participation	• More special programming
11. Stratford Hall	• Gate Keeper • Reception Centre • Gift Shop • Dining Room	• Visitors greeted by gate keeper and escorted to reception centre where they view slide show • Led to Great House for guided tour by costumed interpretor • Self-guided tour of rest	• Visitors receive juice & cookies in the kitchen building • Reception Centre contains Research Library open only to the "scholarly"	• Coaching days held every 3 years • 3 open houses • Jan.19 - R.E. Lee's Birthday • July 4 • Spring • Xmas Candlelight Tour	• —	• More special event and more annual day events

EXHIBIT III-9 continued

COMPARABLE SITE ANALYSIS

ANALYSIS OF VISITOR SERVICE FACILITIES AND PROGRAMS

	Visitor Service Facilities	Description of Visitor Orientation	Description of Other Visitor Service Programs and Activites	Description of Special Events	Most Successful/ Unsuccessful Programs	Other Programs You Would Like to Implement
Bethune Memorial House	• Visitor Centre • Parking Lot	• Guests have choice of going to House or Visitor Centre first as parking lot is located in the middle • Guided tour of restored portion of home • Guests are self-guided through rest of home and visitor centre	• Display of Chinese gifts gifts in visitor centre • 10 minute video is available on demand for viewing • School programs done in costume	• July 1 - Heritage Days - costumed • Xmas Open House -lasts 2 weeks before Xmas to Dec. 31 • 10th Anniversary Event in Aug '86	• all programs successful	• More ground tours • More school programs • Revamping and renewing of interpretive plans
Joseph Schneider Haus	--	--	• Quilting and Schnitzing Bees • Heritage Gallery • Everyday House hold chores are performed • Wool and flax are spun	N/A	N/A	N/A
Doon Pioneer Village	--	--	• Legendary Conestoga Wagon	N/A	N/A	N/A
The Segram Museum	--	--	• Multi-media program • Audio-visual programs throughout the exhibition area	N/A	N/A	N/A
Woodside	• Orientation centre in basement of house	• guided tour of historic house • guests may also have self-guided tour	• orientation film • additional display material on Mackenzie King • cooking demonstrations • orientation film	• Thanksgiving • Heritage Day • Victorian Day • Canada Day • Victorian Christmas • June Garden Party	• Victorian Christmas	• Additional special events during non-peak periods

EXHIBIT III-10
COMPARABLE SITE ANALYSIS
ANALYSIS OF DEMAND

Site	Attendance	Market Segmentation by Season	Demand by Season	Description of Group Visitation	Weekday/Weekend Demand	Characteristics of Visitors (Origin/Demographic)	Trends in Visitation
1. Monticello	1985 538,941 1984 529,163 1983 502,174 1982 521,360 1981 517,958 1980 461,850	. Individuals/families -summer . School groups - April/May July/August . Seniors groups - Oct.	. July/August - busiest . April/May - next busiest . October - third busiest	. May is the biggest group . School groups . Tour groups . Tour groups - seniors and non-seniors . Special interest groups (historic trusts, associations, foundations).	—	. Overall - more casual visitors than group visitors . Origin: 1. Virginia 2. California 3. Ohio 4. Pennsylvania 5. Maryland	. Group tours have increased but still have more individuals than groups
2. Bell Homestead	Averages 30,000-40,000 per year Christmas Open House, 1,000 in first year, 600-800 in subsequent years	. School groups - May/June . Tour groups - Fall . Individuals - groups - summer . Foreign Visitors - December . Individuals - rest of year	. June to October - busiest . April/May/Dec. - steady . March - so-so . Nov/Jan/Feb - negligible	. Tour groups - primarily senior . Few special interest groups	Summer - 50% weekday - 50% weekend Off season - 10% weekday - 90% weekend	. 25% local/75% visitors . Visitor survey to follow New York and Michigan	. Americans as a percent of total visitation is down especially . More young adults . More tour groups
3. Dundurn Castle	1985 59,227 1984 63,994 1983 64,081 1982 75,761 1981 74,992 1/3 of attendance is during special events	. School groups-Jan/Feb . Casuals, special interest and tour groups - summer . Casuals - rest of year	. July, Aug. - 30% . June/Sept/Oct/Nov - 35% . December - 30% . Jan-May - 5%	. School groups grade 8 . Tour groups - seniors . Special interest groups antique, historical, women's and seniors groups	. 10% weekday . 90% weekend	. More visitors than local residents . Seniors - 15% . Adults - 49% . Students - 8% Children - 29%	. Decreasing percentage of Canadians - increasing percentage of Americans . More adults
4. Gibson House	1985 13,300 1984 17,100 1983 12,200 1982 14,600 1981 11,500 . Fall Festival draws 2-3,000	. School groups - Dec . Special interest groups and individuals for the rest of the year	. Winter - 21% . Spring - 24% . Summer - 24% . Fall - 31%	. No tour groups . School groups -largest kind - grades 1 and 2 -next - grades 3-8	. Weekday over 50% . Weekend under 50%	. 65% Metro Toronto . 20% peripheral to Toronto . 15% tourists	. Getting more high school students . More school groups overall (due to marketing. . Decline in booked groups . Fewer tourists
5. Mount Vernon	. Average 1,000,000 per year . Highest year 1964 - 1,300,000	. Groups & individuals-spring and fall . Individuals - winter and summer	. Nov-Mar - 20% . April - 15% . May-Aug - 50% . September - 15%	. School groups . Tour groups . Special interest groups (very few) history and preservation clubs	—	. largely local visitation (16 miles to Washington)	. More seniors over past few years . Increase in groups over individuals
6. Bellevue	1985/86 56,000 1984/85 52,000 1983/84 53,000 1982/83 57,000 1981/82 53,000	. School groups - Sept/May/June . Tour groups - all year . Individuals - all year -primarily summer	. May-Oct - 60% . Sept-April - 40%	. School groups . Tour groups - seniors . Special interest groups - assoc.	—	. Ontario - bulk of visitation . Americans - 7% Quebec - 4%	. People visiting Kingston for boat tours - increasing visitation at at bellevue
7. Hildene	1985 72,000 (including special events 1985 45,000 (only reg. house attendance) 1984 39,500 1983 34,000 1982 29,000 1981 23,500 1980 18,000	. School groups - May and Sept/Oct . Tour Groups - Oct . Family - May-Oct . 50% Mid May-Mid Sept . 50% Mid Sept - Close	. 50% Mid May to Mid Sept . 50% Mid Sept to Early Nov	. 350 Buses per yr . Bus Groups - 33% of total visitation	—	. Most visitors 50+ years . Visitors primarily south of Hildene	. drop in school visits due to increase in admission (25¢ to $1.00.
8. Louis St. Laurent	1985/86 24,500 1984/85 19,794 1983/84 24,000 1982/83* 12,000 *Opened Aug 7-Oct 1	. School groups - May/June/July/Oct/Nov . Special interest groups - June/July/August . Casual/Family - July 1, August	. Winter - 1% . Spring - 15% . Summer - 75% . Fall - 9%	. No tour groups . 7% school groups . 25% special interest groups "seniors" clubs . 68% casuals (1984/85)	—	. 40% Region . 40% Metro Montreal . 10% Metro Quebec . 10% US/Ont/Europe (1984/85) . 1985/86 will have different distribution . 40% of visitors 55+ years	. More individuals because of advertising
9. MacKenzie House	Ranges between 14-18,000	. More visitors than locals - summer . More locals for special events . Overall 1/2 groups and 1/2 individuals	. Summer and December-busiest . Quiet months Jan & Feb	. Elementary school groups . Education groups . Camp groups . In the process of entering the the travel trade market.	—	. Follow general visitor patterns to Toronto . Primarily from Ontario . Americans	. Influx of Japanese tourists 1984/85 due to Japanese writers on Fam tours to Toronto

EXHIBIT III-10 continued
COMPARABLE SITE ANALYSIS
ANALYSIS OF DEMAND

	Attendance	Market Segmentation by Season	Demand by Season	Description of Group Visitation	Weekday/Weekend Demand	Characteristics of Visitors (Origin/Demographic)	Trends in Visitation
10. Sir Wilfred Laurier	Average 10,000 per year	. School groups May/June . Tourists - July/Aug/Sept . Special interest groups July/Aug/Sept . Few tour groups	. Winter 5% . Spring 10% . Summer 80% . Fall 5%	. School 20% . Special interest 10% . Tourists 70% . Few tourist groups	. 50% weekend . 50% weekday	. Age: Under 11 - 39% 12-17 - 5% 18-34 - 17% 35-49 - 19% 50-64 - 13% 65+ - 7% Regional Visitation 40% Montreal 34% Other 26%	. Average visitor returns 1-2 times . 60% of visitors take part in traditional activities
11. Stratford Hall	1985 54,000 1984 40,000+ 1983 40,000+ 1982 40,000+ 1976 50,000+	. Heaviest months April/May and Sept/Oct	. Winter - quiet . Spring - 60% . Summer - busy . Fall - 40%	. Children's groups . garden groups . furniture groups	. Weekends are busiest	. 60% Virginia/Mass/Washington . 40% - other states and foreign	. Definitely more women visitors
Bethune Memorial House	April '85-March '86 16,800 April '84-March '85 16,700 April '83-March '84 18,700	. Winter - local school groups . April 1-Oct. 31 -tourists . Bus tours summer and fall	. Winter - 10% . Spring - 20% . Summer - 50% . Fall - 20%	. School groups . Senior Citizens . People's Republic of China groups	. --	. 10% local visitors . 90% non-local -Southern Ontario -Quebec -USA -Europe	. Booking more groups over whole year . Trend towards seniors and parents with pre-school age children in April/May and Sept/Oct
13. Joseph Schneider Haus	1985 21,864 1984 21,469 1983 16,393 1982 17,899	. N/A	. N/A	. N/A	. N/A	. N/A	. N/A
14. Doon Pioneer Museum	1985 29,373 1984 29,764	. N/A	. N/A	. N/A	. N/A	. N/A	. N/A
The Seagram Museum	N/A N/A	. N/A	. N/A	. N/A	. N/A	. N/A	. N/A
Woodside	1983 34,167 1984 38,824 1985 38,390	. Tourists - July, Aug Sept, Oct. . School Groups - winter and spring seasons . Tour Groups - year round but heaviest in the fall . Special Interest Groups June, July, Oct and Dec.	Winter - 8.0% Spring - 24.0% Summer - 36.0% Fall - 32.0%	. Special Interest 22% . Tour - 25% . School - 53%	. Weekdays - 46% . Weekends - 32% . Special Events-32%	. Casual 80% Ontario 16% U.S. & other 4% overseas . Groups 45% Kitchener Waterloo 18% Waterloo Region 19% other Ontario 1% other Provinces 16% United States . Others Local area school & special interest groups	. Special events are popular . strong local demand . small families (2-4) . 30% of visitors are groups . 70% are casual

Note: Winter - January, February, March
Spring - April, May, June
Summer - July, August, September
Fall - October, November, December

EXHIBIT III-11

COMPARABLE SITE ANALYSIS

OPERATING INFORMATION

Site	Total Operating Budget	% of Budget Visitor Services	Key Components of Marketing Plan	Employee/Staffing	Current Site Concerns	Other Comments
Monticello	N/A	N/A	. Attend trade shows 2-3 year . Brochures/tour planning guide . Directors speak on a regular basis . Membership - travel association . Conduct surveys . direct mail	. 80 FT + 70 PT seasonal divisions . Public Affairs (Marketing) . Guides . Archeology . Building/Maintenance . Grounds/Gardens	. orientation and educational programming were concerns but will be resolved by adjacent visitor centre	. Visitor Orientation Centre - planned - located 1/2 way between Monticello and Charlottesville - will include - learning resources centre - audio visual - museum . Anticipated that visitors to V.O.C. would proceed to Monticello . New director of education there will put together a school program
2. Bell Homestead	N/A	N/A	. Brochures - self-guiding, lure and full colour . Entry in MTR tourism brochures . Newspaper - included with Parks and Recreation promoter	. 1 FT Curator . 1 FT Assistant Curator . 6 PT seasonal guides . Maintenance - parks and recreation dept.	. Capacity - if telecommunications museum proceeds (attendance projected at 300,000) attendance at Bell Homestead would also increase current facilities do not have the capacity	. Visitor Centre - built to provide place for groups to congregate, provide theatre and orientation . Admission - may charge a 2 for 1 rate when telecommunications museum opens . At maximum capacity . Theming - must be cognisant of theme, inside and out, all buildings must reflect theme . Tour groups - increasing because of aggressive promoting of nearby attractions.
3. Dundurn Castle	N/A	N/A	. Word of mouth . Distribution of brochures - auto clubs, tour operators, Canada & U.S.A. . Local newspapers - events and programming . educational kit	. 1 FT Curator . 3 FT Montor . 3 FT Admin. Staff . 3 FT Maintenance . 10 FT Intrepreters . 4 FT Seasonal	. Do not have enough space for special programming and orientation	
4. Gibson House	$221,000	75% (inc. salaries)	. Flyers to North York -community centres/ library . Press releases by historical board . Local newspapers . School kits . MTR publications . brochures	. 1 FT Curator . 1 FT Asst. Curator . 6 PT Guides/ Interpreters . 1 FT Senior Historical Interpreter . 1 PT typist . 1 PT/FT housekeeper . 1 FT gift shop . 1 FT kitchen . Maintenace - North York Parks and Rec. . 2 volunteers at all times . Always have someone conducting internship program	. Trying to get visitors to come on a more regular basis rather than just at special events. . Capacity problems at special events and under-utilized during normal operations . Feels visitors wait for special event before attending site	. Volunteer Program - members of North York Historical society - self-directed . HYHS conducts training, provide own costumes - greet visitors, help with casual visitor tours, help in gift shop, provide crafts for sale in gift shop . Orientation - feels should be given prior to touring site and should have visual aspects
5. Mount Vernon	N/A	N/A	. 100,000 brochures distributed to tour operators, travel agents, etc. . No other paid advertising as in peak season operating at capacity (1 hour line-up)	. 100 FT Historical (inc. 35 guides) . 100 FT Administration and Sales	. Orientation - limited by size and floor plan of mansion and thus self-guided tours is really the only workable touring technique although guided tours are optimal	. Wear a uniform rather than a costume as site is a preservation not a restoration . Conducting market study . One building on site portrays process of preserving site and another contains artifacts of era . Restrooms are hidden from view

EXHIBIT III-11 continued

COMPARABLE SITE ANALYSIS

Site	Total Operating Budget	% of Budget Visitor Services	Key Components of Marketing Plan	Employee/Staffing	Current Site Concerns	Other Comments
6. Bellevue	N/A	N/A	. Brochures . Liason with Parks Canada . Local organizations - VCB, Chamber of Commerce, etc.	. 1 FT Curator . 2 FT Museum Assistants . 2 FT Superintendent . 1 FT Maintenance . +PT/seasonal staff	--	--
7. Hildene	N/A	N/A	. Brochures . Volunteers advertise weekend events . Press Releases . Association Membership . Direct Mail	. 1FT President (Volunteer) . 3 FT Vice Presidents . 1 FT Building and Grounds . 1 FT Ass't Building & Grounds . 1 PT Summer Garden Supervisor . 2 PT Office Help . 1 PT Gift Shop . Summer - 1 PT/2 FT Guides . Winter - 2 PT Ski operations	. Serving disabled people - ie. restrooms . difficult to fit modern requirements in old buildings . distance between visitor reception and house	. Only 20 acres of site used for summer programming . Special events account for 37.5% of total visitation
8. Louis St. Laurent	N/A	N/A	. Local/regional television - 30 sec public service announcement - 200 times/year . Brochures . Radio interviews . Invite written media to events	. 1 FT Superintendent . 1 FT Interpreter . 5 PT Guides . 1 FT Maintenance	. Capacity - in summer they reach and exceed capacity - i.e. film (which communicates 70% of the theme can accommodate 60 people per hr. often get over 400 between 1:30 and 5. Therefore congestion and does not maximize visitor experience . Also - needs to balance out visitation and increase off-season visitor proportions. Tackling this by increasing public service announcements in off season.	. Closed in April and early May for repairs, cleaning and staff training . Television - public service announcement only cost was to produce film - already seen a rise in non-resident origins. Increasing running of program in fall to increase off-season visitation
9. MacKenzie House	N/A	N/A	. Brochures . Press releases . Public service announcements . Media contacts . Flyers . Special events listings . Reach tourist market through "Key to Toronto" magazine	. 2 FT Interpretation staff . 1 FT Curator for MacKenzie House Spadina House and Colborne Lodge . 4 PT Guides . 3 PT Printers . 2 PT Extra Guides Centralized staff for . Curatorial services . Maintenance . Conservation & Registration . Design . Administration & Payroll	--	--
10. Sir Wilfred Laurier House	N/A	N/A	. Parks Canada and Tourisme Quebec Brochures . Community Newspapers . Radio	. 1/2 FT Superintendent . 1 FT Chief Interpreter . 2 PT Seasonal Guides . 8 Volunteers to complement guides	. limiting size and cannot accommodate tour groups . Congestion problems . House is not accessible to the disabled	. Interpretation is necessary to provide visitors with an understanding of what they will be seeing
11. Stratford Hall	N/A	N/A	. Brochures . Radio . Board of Directors . State-Wide Travel Council . State-Wide Fam Tours . Gift Shop Items	. 20-25 FT . 55-60 PT . 25 guides . 4 reception . 3 library . 15 administrative . 10 dining room . 12 farm . 5 gift shop	. Improve interpretation— . Due to rural location, people have to go out of their way to reach site	
12. Bethune Memorial House	N/A	N/A	. Park Brochures . 2 travelling exhibits to hospitals, libraries . Summer Info Cart in Gravenhurst	. 1-4 Guides . 3 FT Staff - Superintendent -Clerk - Interpretive Supervisor . Seasonal Curator	. Not total wheelchair access as restrooms are on upper level	. Not encouraged to advertise

EXHIBIT III-11

COMPARABLE SITE ANALYSIS

OPERATING INFORMATION

Site	Total Operating Budget	% of Budget Visitor Services	Key Components of Marketing Plan	Employee/Staffing	Current Site Concerns	Other Comments
13. Joseph Schneider Haus	N/A	N/A	. N/A	. N/A	. N/A	. N/A
14. Doon Pioneer Village	N/A	N/A	. N/A	. N/A	. N/A	. N/A
15. The Seagram Museum	N/A	N/A	. N/A	. N/A	. N/A	. N/A
16. Woodside	224,200	10,000 (excludes staffing)	. Brochures (produced by Parks Canada) . Limited media advertising . Some public relations activities	. 1 Superintendent . 1 Clerk (Admin.) . 1 Visitor Activities Clerk . 1 Historic Resources . 1 Park Guide . 1 Maintenance . 2.2 Part time	. Safety . Congestion . Washrooms . Visitor comfort . Historical inaccuracies . Parking . Administrative/ interpretive conflicts	

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SECTION IV - USER GROUP ANALYSIS

Groups which are current or potential users of Woodside National Historic Park were interviewed by telephone. The groups interviewed included: seven school groups (public and secondary), twenty-one tour operators, and ten special interest groups (i.e. senior citizens groups, hospital groups and Brownies). These groups were asked to outline their requirements for facilities and programming at Woodside, months of visitation, characteristics of their groups and comments on the potential for visitor/administrative building development. The results of these interviews will aid in determining the impact of improvements to the Park, particularly as relating to facilitating group tours.

4.1 Tour Operator Interviews

On average, the tour operators interviewed, offer 1 tour per month or 11 tours per year to the Kitchener/Waterloo area. Forty-two per cent of these tours include Woodside. The other attractions/events included in the tours most often are the Farmer's Market, Oktoberfest, Schneider Haus, Seagram's Museum and the Factory Outlets.

The Christmas period and the summer time are the most popular periods for tour groups, followed by the fall. Several of the tour operators plan their trip to Woodside at Christmas to coordinate with the Victorian Christmas celebration and decorations. Some of the fall tours are planned to coordinate with the local Oktoberfest celebration. Few tour groups visit the site in the spring or winter months.

The average group size is 41, which corresponds to the capacity of a tour bus.

Slightly more than half of the tours allocate one hour for a tour of Woodside, approximately 30% spend between one hour and two hours, while 15% spend two hours on site. When asked if they would have more time available to tour Woodside, most tour operators said no (83%). Generally, tours are operated on a tight schedule with little time for flexibility.

Thirty percent of the tour operators stated that they had experienced problems with the facilities at Woodside. All cited the stairs to the basement as the problem due to the

number of senior citizens on their tours. When presented with the option of a visitor/administrative building, 77% of tour operators felt it was a viable alternative for Woodside and 23% did not have an opinion. Comments in favour of a visitors/administrative building included; the elimination of the steep stairs, upgrading of other facilities, provision of more information, potential to split groups and be helpful to seniors and the disabled in terms of accessibility. Some tour operators expressed concerns regarding the historic value of the site and the fear of losing its present image and character with the development of a visitor/administrative building.

If a visitor/administrative building was developed at Woodside, the facilities/programs the tour operators identified as required would include:

- orientation centre
- educational/historical emphasis
- refreshments available
- restrooms

Overall, the tour operators felt that facilities at Woodside are well kept and they were satisfied with the existing programming, specifically the costumes that the interpreters wear. The problems or concerns that they have with the site are related primarily to accessibility. They felt that a visitor/administrative building would correct this problem as well as presenting a better opportunity for orientation. Operators are genuinely concerned with maintaining the historic value of the site, and as such a visitor/administrative building would have to blend with the themes of the site.

4.2 Special Interest Groups Interviews

The special interest groups interviewed were primarily from the Waterloo Region, and varied in the number of groups taken to Woodside each year. The clubs and associations surveyed averaged 1 to 2 groups to Woodside per year. The local hotels and Convention and Visitor Bureau arrange tours for groups of business people or conference delegates, when time permits, and on average, book 30-50 groups to Woodside per year. On all of these tours, Woodside is the main destination one-third of the time. The attractions that are the main destinations the remainder of the time include:

- Schneider Haus
- Mennonite Tour
- Elmira
- St. Jacob's
- Brox's
- The Mill
- Centre in the Square
- Doon Pioneer Village

Most of these attractions are also included on the tours where Woodside is the main attraction.

The time of year when special interest groups visit Woodside parallels that of the tour groups, with the most popular periods being Christmas and summer, followed by the fall. Few groups visit in the winter or spring.

Half of the groups surveyed plan their tour to coordinate with special events at Woodside, particularly the Victorian Christmas.

Half of the groups spend an hour on site, while forty percent spend between one hour and two hours and ten percent spend less than an hour. Receptiveness to spending more time on site was more positive than with the tour groups as three groups stated they had more time available, five groups did not have more time available and two groups did not know.

Most special interest groups (78%) have no problems with the current programs or facilties at Woodside. However, for those that do have problems, they relate to: the stairs, the need for "hands on"/interpretive programs, early closing hour of the site, lack of handicapped facilities and the congestion that occurs in the interpretive area in the basement.

When asked what on-site facilities and programs are required at Woodside, the responses were as follows:

- "hands on" displays
- history trivia games
- historical colouring books
- longer tour
- carriage and horses to take visitors on a tour of grounds
- better stairs
- more cooking/baking

A majority of the special interest groups surveyed (50%) felt that a visitor/administrative building was a viable alternative for the activities and services currently in the basement of the house. They felt that it would enlarge the indoor facilities thereby reducing congestion, it would make it easier for viewing displays, allow for additional activities related to the themes and provide better washroom facilities. Concern was expressed, as in the tour operator interviews, that the historical value of the site not be jeopardized by a modern building, and if a modern building is planned, that it not be in sight of Woodside which might destroy the ambience of the historical setting. However, they felt that the house must be accessible from the visitor centre and thus, only a short walking distance to permit access for the elderly and disabled.

If a visitor/administrative building were developed, the special interest groups have identified the following programs and facilities as desirable:

- "hands on" activities
- children's activities/programs
- attached/covered picnic area
- slide show on other National Parks
- films
- information on the history of the Kitchener/Waterloo area
- longer public hours
- well-trained guides/information officers

The special interest groups are pleased with the site and its current programming; however, there are some concerns about the facility itself and these could be alleviated through the development of a visitor/administrative building. If a visitor/administrative building is developed, the special interest groups have identified some key areas where existing programming could be improved and expanded upon which would provide an optimal visitor experience.

4.3 School Groups Interviews

A list consisting of a representative sample of teachers (5), who have taken classes to Woodside, and three Waterloo Region Board of Education, consultants, was provided by Woodside. The results of our interviews are as follows.

Teachers take an average of 3-4 class trips per year of which 1 is to Woodside. The specific consultants interviewed deal almost exclusively with planning trips to Woodside as 10-15 of the 14-15 trips planned include the park. When Woodside is included in the itinerary it is the main destination of that class trip. The other attractions visited most frequently in the Waterloo Region include Blair Outdoor Education Centre, University of Waterloo, Laurel Creek Conservation Area, Doon Pioneer Village and Schneider Haus.

The grade levels associated with the teachers interviewed were primarily grades 2 and 3, with a few groups at the grade 7, 9 and 10 level. The average group size is 29 students.

The primary time of year for class trips to Woodside is during November and December, however, there are a few trips in February/March, April and September/October. Most of the trips are planned to coordinate with special events and programs, such as the "Victorian Christmas" which is the most popular, followed by "Pioneer Days" and a "Child's Life."

The length of time school groups spend on site is considerably longer than tour groups or special interest groups. Most groups spend between 2 hours and one half day, while only one of the groups spent less than two hours. The time spent at the site currently is the maximum time allotted to that activity and no further time would be available.

Two of the seven school group representatives surveyed had encountered problems with the facilities or programs at Woodside. The concerns included lack of "hands on" activities, children not divided into small enough groups, and problems adapting programs to the age group of the students. Additional programs/facilities that these representatives feel are required at Woodside include:

- programs for Easter and other holidays
- larger facility to hold groups
- visitor centre like Bellevue House
- slide shows
- programs for older students
- Woodside taking programs to education consultants to see if they can be directly incorporated into the "unit" being taught

All but one person interviewed identified a visitor/administration building as a positive development for Woodside. The reasons for the inclusion of a visitor/administration building were: the need for more space; "an absolute must"; to provide relief from the small, hot basement; and the need for a "20th Century Museum". Again, concern was expressed about preserving the historical value of the site. If a visitor/administration building is developed, the teachers would like to see the following included:

- more "hands on" activities
- photographs of reconstruction
- theme based activities
- tours conducted in French for French classes
- create a sense of the Victorian theme

Most of the school group representatives felt that the existing program is good at a basic level and is tailored to their needs. However, the advent of a visitors/administration centre; which would allow more room for groups to relieve congestion, and would provide the opportunity for additional programming to suit the requirements stated in these interviews.

4.4 Summary

Interviews with the various user groups identified many of the operational concerns addressed in the draft Interpretive Plan concerning programming and facilities. It was generally agreed that the development of a visitor/administration building would alleviate most if not all of their concerns.

The user groups were positive regarding the potential for visitor/administrative building at Woodside, indicating that improved facilities and programming could lead to increased visitation levels.

SECTION V DEMAND ANALYSIS

5.1 Introduction

In this section of the report we have dealt with the projected level of visitation to Woodside National Historic Park. These projections have included an assessment of the individual market segments which Woodside attracts as well as an evaluation of Woodside's current and projected market position with respect to each of these segments.

This demand analysis is used in subsequent sections to determine potential capacity limitations and other possible impacts on the existing site and the proposed visitor/administration building.

Specifically, we have projected overall growth rates on a seasonal basis for each market segment, and have projected Woodside's penetration into each. For the purpose of this analysis we have projected three alternative scenarios, representing the following assumptions:

Alternative 1 - Status Quo

- assumes no further development of facilities or programs at Woodside, with visitation projections representing increases based on continued, but slowed, market growth

Alternative 2 - Visitor Building

- assumes development of a visitor/administration building at Woodside with no further programming or marketing, but with improved market position as a result of improved operation

Alternative 3 - Visitor Building/Marketing Strategy

- assumes development of visitor/administration building at Woodside, but includes further improvement in market position as a result of improved operations and marketing

5.2 Market Penetration

As discussed in Section II, Woodside National Historic Park attracts five primary market segments. Overall trends and growth within these segments at the macro level directly influences the level of visitation to Woodside. For each of these segments, we have evaluated the level of activity occuring at Woodside and have evaluated the Park's penetration into the total market for that segment.

Exhibit V-1 summarizes Woodside's penetration into each of the market segments for the year 1985. It should be noted that the information on the total market for each segment has been generated through our research and available data sources for the purposes of this study.

Market penetration rates have been derived through evaluation of visitation by market segment to Woodside, and the percentage which that number represents of total activity of that market in the Region of Waterloo. For the purposes of the subsequent visitation projections in this report assumptions have been made (based on our market research) regarding growth in each sector, and based on improved facilities at Woodside, the ability of the park to maintain or improve penetration into each sector.

The casual visitor market is comprised of small family types of 2-4 members as well as individuals and seniors. While data compiled by the park indicates that this market accounts for 70 percent of visitation to Woodside, no data exists to differentiate between the resident and tourist components of this segment. This differentiation is important for evaluating market potential and in attracting visitors from these markets. For the purpose of this study, local visitation from within the casual market has been estimated at 60 percent and tourist visitation at 40 percent. This resident/tourist split has been based on estimates of Park officials as well as a review of visitation to comparable parks, and other cultural/historical facilities in the Waterloo area. These figures also parallel that of the resident/tourist mix of group visitation to Woodside. While we feel comfortable with the figures used in the analysis, it is recommended that the park consider alternative reporting mechanisms to more accurately reflect this mix. An on-going visitor survey would be the most effective method of obtaining this data.

EXHIBIT V-1

WOODSIDE NATIONAL HISTORIC PARK

MARKET PENETRATION - 1985

Market Segment	Total Market	Woodside Market	Market Penetration*
Casual			
Resident	328,224	16,718	5.1%
Tourist	325,000	11,145	3.4%
Group			
Special Interest	27,000	2,240	8.3%
School Groups	75,000	5,760	7.7%
Tour Groups	80,000	2,528	3.2%

*Market penetration includes repeat visitation

The casual resident market accounted for 16,718 trips to Woodside in 1985. With a population of 328,224 (1985) in the Region of Waterloo, Woodside attracted the equivalent of 5.1% of the region's population to the park during 1985.

Tourist visitation to the Region of Waterloo in 1985 was approximately 800,000 (Source: Waterloo/Stratford Tourism Plan, 1985). Of this figure, 325,000 were casual visitors (excluding business or group travellers). The casual tourist market accounted for 11,145 visitors to Woodside in 1985, a penetration of 3.4% into the total casual tourist market.

Special interest groups include those groups primarily interested in the historic nature of the house and include groups from various associations, clubs, and affiliations, primarily from within an hour of the site. Based on interviews with these groups it has been estimated that approximately 900 groups visit attractions and facilities within the region on an annual basis with the total number of visitors at 27,000. With Woodside attracting 2,240 visitors (80 groups) from this segment, its current market penetration is approximately 8.3%.

School groups have traditionally been the strongest group market for Woodside, a reflection of the strong programming available for them. Based on interviews with various school groups and educational representatives it has been estimated that approximately 2,500 school groups and 75,000 students visit various attractions, facilities and events throughout the region. School groups accounted for 5,760 visitors (182 groups) to Woodside in 1985, a penetration of 7.7% into total school activity.

Based on figures from the Waterloo/Stratford Tourism Plan, and information supplied by the Kitchener Visitor and Convention Bureau, an estimated 2,000 tour groups with 80,000 visitors came to the Region of Waterloo in 1985. Tour group visitation to Woodside was 2,528 individuals (62 groups), a penetration of 3.2%.

Based on the foregoing analysis, Woodside has achieved its strongest penetration into the special interest and school group markets. Conversely, the lowest penetration is within the casual and group tourist markets, an area where effective marketing could improve overall visitation.

5.3 Market Projections

For each of the market segments evaluated at the macro level we have projected overall growth for the period 1986-1995 (see Exhibit V-2). For the purpose of this analysis, we have utilized a straight line compound growth rate for each segment. Growth rates have been applied on a seasonal basis with exception of the resident population projections and are based on an analysis of historic trends, projected economic conditions, and general market trends. These projections provide the basis for the estimates of visitation to Woodside as the growth in overall markets will have a direct impact on visitation to Woodside National Park.

The growth rates utilized in these projections are summarized below:

GROWTH RATES

Market Segment	Winter	Spring	Summer	Fall	Annual
Regional Population	N.A.	N.A.	N.A.	N.A.	1.4%
Tourist Visitation (Casual)	2.0%	2.0%	4.0%	3.0%	3.0%
Special Interest Groups	2.0%	1.0%	2.0%	2.0%	1.8%
School Groups	1.4%	1.4%	1.4%	1.4%	1.4%
Tour Groups	1.0%	2.0%	4.0%	3.0%	3.3%
Overall Growth Rates	2.0%	2.8%	3.8%	3.4%	3.3%

Note: N.A. = Not Applicable

Overall growth in the Regional population over the next ten years is expected to parallel that of the last five years. However, much of this growth is expected to occur within the urban areas of Kitchener and Waterloo, a positive factor for Woodside, as these areas will see stronger growth rates than the overall region.

Casual tourist visitation to the Region of Waterloo is projected to increase at 3.0% per year, with the strongest growth anticipated during the summer months, the traditionally strongest tourist period.

EXHIBIT V-2

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Casual Visitors											
Residential Market											
Residential Population	328,224	332,950	337,745	342,608	347,542	352,547	357,623	362,773	367,997	373,296	378,672
% Growth		1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4
Tourist Market											
Tourist Visitation	325,000	334,588	344,482	354,694	365,235	376,116	387,348	398,944	410,916	423,277	436,040
% Growth		3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
Group Visitors											
Special Interest											
Trips	900	917	933	950	968	986	1,004	1,022	1,041	1,060	1,080
Visitation	27,000	27,495	27,999	28,514	29,037	29,571	30,115	30,670	31,235	31,811	32,390
% Growth		1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8
School Groups											
Trips	2,500	2,536	2,573	2,610	2,647	2,685	2,724	2,763	2,803	2,843	2,884
Visitation	75,000	76,080	77,176	78,287	79,414	80,558	81,718	82,895	84,088	85,299	86,527
% Growth		1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4
Tour Groups											
Trips	2,000	2,065	2,132	2,202	2,274	2,349	2,426	2,506	2,508	2,674	2,763
Visitation	80,000	82,600	85,291	88,076	90,958	93,942	97,030	100,227	103,537	106,963	110,510
% Growth	____	3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3
Total Visitor Markets											
Visitation	835,224	853,713	872,693	892,179	912,186	932,734	953,834	975,509	997,771	1,020,646	1,044,147
% Growth		2.2%	2.2%	2.2%	2.2%	2.3%	2.3%	2.3%	2.3%	2.3%	2.3%

The Special Interest Tour market is expected to increase at 1.8% per year, with the spring experiencing moderately slower growth.

Growth in school group trips will parallel population growth in the region. In general terms, trends in extra-curricular school activites, trips, and excursions, have seen a decrease in recent years. Overall growth from increased activity will be minimal.

Growth in tour groups to the Waterloo Region is expected to parallel that of the overall casual tourist market, with strong summer/fall seasonal increases.

Overall increases to the individual markets which Woodside attracts will be 2.2%-2.3% per annum over the 1985-1995 time period. While historic data is not readily available, it is understood that recent growth patterns for the overall market have followed similar trends, although the tourist market is expected to see stronger growth than historically achieved.

5.4 Alternative Scenarios

As stated in the introductory remarks to this section, we have evaluated three alternative visitation scenarios for Woodside National Historic Park. Each of these scenarios have been evaluated relative to the projected growth for the total market discussed in section 4.3. These alternatives have been evaluated, based on projected growth in visitation to Woodside by market segment on a seasonal basis. Specific consideration has been given to the evaluation of the required market penetration into each of the individual market segments.

Alternative 1 - Status Quo

In this alternative we have assumed no further development of facilities or programs at Woodside, with visitation projections representing increases based on continued market growth. These figures are intended to demonstrate the total number of visitors Woodside could potentially attract, if existing facilities had the capacity to service these levels of visitation. The impact of capacity restrictions at Woodside is examined further in Section VI.

Overall visitation projections for Woodside under this scenario are summarized in Exhibit V-3. The projected attendance levels for 1985 - 1995 and penetration by market segment are summarized in the following table.

MARKET PENETRATION

Year	Casual Residents	Casual Tourists	Special Interest Groups	School Groups	Tour Groups
1985	5.1%	3.4%	8.3%	7.7%	3.2%
1990	5.6%	3.5%	8.7%	8.5%	3.6%
1995	6.1%	3.5%	9.2%	9.5%	3.7%

VISITATION PROJECTIONS

Year	Visitation	% Growth
1985	38,391	(0.1%)
1986	39,653	3.3%
1987	40,959	3.3%
1988	42,309	3.3%
1989	43,706	3.3%
1990	45,151	3.3%
1991	46,645	3.3%
1992	48,191	3.3%
1993	49,790	3.3%
1994	51,444	3.3%
1995	53,156	3.3%

These projections have assumed increasing penetration into the casual resident, special interest and school group markets. These segments have traditionally been the strongest markets for Woodside, however the growth projected is lower than actually experienced over the 1981-1985 time period (6.3% compound growth annually). The average increase in visitors to Woodside on an annual basis for 1981-1985 was 2,085. The projected average increase to 1995 is 1,476.

EXHIBIT V-3

ALTERNATIVE I - STATUS QUO

Visitation Projections	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Casual Residential	16,718	17,263	17,827	18,409	19,010	19,632	20,274	20,937	21,623	22,331	23,063
% Growth		3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3
Casual Tourist	11,145	11,502	11,871	12,252	12,647	13,055	13,478	13,915	14,367	14,836	15,320
% Growth		3.2	3.2	3.2	3.2	3.2	3.2	3.2	3.3	3.3	3.3
Special Interest Groups	2,240	2,305	2,373	2,442	2,513	2,587	2,662	2,740	2,820	2,903	2,988
% Growth		2.9	2.9	2.9	2.9	2.9	2.9	2.9	2.9	2.9	2.9
School Groups	5,760	5,965	6,177	6,396	6,624	6,860	7,105	7,359	7,622	7,895	8,178
% Growth		3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.6
Tour Groups	2,528	2,618	2,712	2,810	2,911	3,016	3,126	3,239	3,357	3,480	3,607
% Growth		3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.6
Annual	38,391	39,653	40,959	42,309	43,706	45,151	46,645	48,191	49,790	51,444	53,156
% Growth		3.3%	3.3%	3.3%	3.3%	3.3%	3.3%	3.3%	3.3%	3.3%	3.3%

While Woodside will continue to remain an attractive experience to the various markets it presently attracts, it is unlikely that the strong growth rates experienced in recent years can be maintained under current operating conditions. Operational constraints such as congestion, capacity, washrooms, etc. will become more critical as visitation levels rise, and eventually a functional capacity will be reached.

As a result of the capacity analysis conducted in Section VI, it is apparent that the attendance levels projected here would be difficult to attain due to operational and functional facility limitations. In reality, achieved attendance levels under this scenario would be much lower than those projected.

Alternative 2 - Visitor Building

For the purpose of this scenario it has been assumed that a Visitor/Administration Building is developed at Woodside with its first full year of operation being 1989. The visitation projections for this alternative are based on the same market projections as Alternative 1, but account for increased market penetration as a result of the improvement of facilities at Woodside through the development of a Visitor/Administration Building.

Overall visitation projections for Woodside under this scenario are summarized in Exhibit V-4. The projected attendance levels for 1985 - 1995 and penetration by market segment are summarized below.

MARKET PENETRATION

Year	Casual Residents	Casual Tourists	Special Interest Groups	School Groups	Tour Groups
1985	5.1%	3.4%	8.3%	7.7%	3.2%
1990	6.0%	3.8%	9.8%	9.3%	3.5%
1995	6.9%	3.8%	10.5%	10.5%	3.6%

EXHIBIT V-4

ALTERNATIVE 2 - VISITOR BUILDING DEVELOPMENT

Visitation Projections	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Casual Residential	16,718	17,263	17,827	18,409	19,844	21,193	22,423	23,516	24,427	25,228	26,055
% Growth		3.3	3.3	3.3	7.8	6.8	5.8	4.9	3.9	3.3	3.3
Casual Tourist	11,145	11,502	11,871	12,252	13,298	14,123	14,749	15,256	15,723	16,206	16,705
% Growth		3.2	3.2	3.2	8.5	6.2	4.4	3.4	3.1	3.1	3.1
Special Interest Groups	2,240	2,305	2,373	2,442	2,686	2,888	3,032	3,121	3,212	3,306	3,402
% Growth		2.9	2.9	2.9	10.0	7.5	5.0	2.9	2.9	2.9	2.9
School Groups	5,760	5,965	6,177	6,396	7,017	7,529	7,897	8,179	8,472	8,775	9,089
% Growth		3.6	3.6	3.6	9.7	7.3	4.9	3.6	3.6	3.6	3.6
Tour Groups	2,528	2,618	2,712	2,810	3,085	3,312	3,475	3,600	3,731	3,866	4,007
% Growth		3.6	3.6	3.6	9.8	7.4	4.9	3.6	3.6	3.6	3.6
Annual	38,391	39,653	40,959	42,309	45,930	49,045	51,577	53,672	55,565	57,380	59,259
% Growth		3.3%	3.3%	3.3%	8.6%	6.8%	5.2%	4.1%	3.5%	3.3%	3.3%

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VISITATION PROJECTIONS

Year	Visitation	% Growth
1985	38,391	(0.1%)
1986	39,653	3.3%
1987	40,959	3.3%
1988	42,309	3.3%
1989	45,930	8.6%
1990	49,045	6.8%
1991	51,577	5.2%
1992	53,672	4.1%
1993	55,565	3.5%
1994	57,380	3.3%
1995	59,259	3.3%

These projections have assumed increased market penetration in 1989 when the new Visitor/Administrative Building opens for operation. This development in itself will generate a significant amount of "induced" demand with visitors coming to the site not only to see the house, but in some cases just to see the visitor building. Attendance in 1989 is projected to experience a significant increase (8.6%), with growth rates decreasing in the 2nd to 5th year of the building's operation (1990-1993), and being maintained in subsequent years at pre-development levels. The compound growth rate for these projections is 5.0% for the 1985 - 1995 time period, with an average annual increase of 2,087 visitors per year. For the 1989-1993 time period (the building's first five years of operation) the compound growth rate is 5.6% and the average annual increase 2,651. While the annual increase in visitation over the 1989-1993 time period is higher than growth in the 1981-1985 period (2,085 visitors per year), the annual growth rate is actually lower (5.6% compared to 6.3%). Growth over the ten year period projected (1986-1995; 2,087 visitors per year) is at par with growth over the 1981-1985 time period.

Alternative 3 - Visitor Building/Marketing Strategy

In addition to the development of a visitor/administration building at Woodside, this scenario includes the impact of an increased marketing and promotional effort conducted by Woodside. The marketing guidelines and parameters on which these projections are based, are summarized in Section VII.

Exhibit V-5 summarizes the visitation projections under this scenario, with annual growth and market penetration summarized below.

MARKET PENETRATION

Year	Casual Residents	Casual Tourists	Special Interest Groups	School Groups	Tour Groups
1985	5.1%	3.4%	8.3%	7.7%	3.2%
1990	6.1%	3.8%	10.4%	10.0%	3.8%
1995	7.1%	4.1%	11.3%	12.1%	4.1%

VISITATION PROJECTIONS

Year	Visitation	% Growth
1985	38,391	(0.1%)
1986	39,653	3.3%
1987	40,959	3.3%
1988	42,311	3.3%
1989	49,608	10.9%
1990	50,669	8.0%
1991	53,511	5.6%
1992	55,758	4.2%
1993	58,102	4.2%
1994	60,458	4.2%
1995	63,099	4.2%

EXHIBIT V-5

ALTERNATIVE 3 - VISITOR BUILDING/MARKETING STRATEGY

Visitation Projections	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Casual Residential	16,718	17,263	17,769	18,289	20,068	21,633	22,903	23,804	24,742	25,716	26,728
% Growth		3.3	2.9	2.9	9.7	7.8	5.9	3.9	3.9	3.9	3.9
Casual Tourist	11,145	11,502	11,928	12,373	13,473	14,349	14,998	15,636	16,302	16,997	17,723
% Growth		3.2	3.7	3.7	8.9	6.5	4.5	4.3	4.3	4.3	4.3
Special Interest Groups	2,240	2,305	2,373	2,442	2,808	3,089	3,244	3,341	3,441	3,544	3,651
% Growth		2.9	2.9	2.9	15.0	10.0	5.0	3.0	3.0	3.0	3.0
School Groups	5,760	5,965	6,177	6,396	7,337	8,060	8,653	9,081	9,530	10,001	10,496
% Growth		3.6	3.6	3.6	14.7	9.9	7.4	4.9	4.9	4.9	4.9
Tour Groups	2,528	2,618	2,712	2,810	3,222	3,538	3,713	3,895	4,087	4,289	4,500
% Growth		3.6	3.6	3.6	14.7	9.8	4.9	4.9	4.9	4.9	4.9
Annual	38,391	39,653	40,959	42,311	46,908	50,669	53,511	55,758	58,102	60,548	63,099
% Growth		3.3%	3.3%	3.3%	10.9%	8.0%	5.6%	4.2%	4.2%	4.2%	4.2%

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As is the case with Alternative 2, these projections have assumed increased market penetration in 1989 when the new Visitor/Administrative Building opens for operation. In addition to demand "induced" from the opening of the new building, these projections include the impact of increased marketing and promotional efforts by the site. As a result, visitation in 1989 is projected to experience stronger growth than projected in Alternative 2 (10.9% compared to 8.6%) with growth rates decreasing in the 2nd to 5th year of the building's operation (1990-1993) but being maintained in subsequent years at higher levels than originally projected (4.2% to 3.3%), a reflection of the long term impact of increased marketing and promotional efforts.

For the ten year period projected, the compound growth rate is 5.1% and the average annual increase in visitation is 2,471 visitors per year. For the 1989 to 1993 time period, the compound growth rate is 6.6% and the average annual increase 3,158. Compared to growth over the 1981 - 1985 time period (6.3% compound growth, 2,085 visitors per year), these projections suggest a much stronger period of growth over the 1986 - 1995 time period, and significantly more in the 1989-1993 time period. With the impact of the new Visitor/Administration Building as well as an improved marketing and promotional effort, these projections would certainly be attainable.

5.5 Summary of Alternatives

As stated in the description for each of the individual scenarios, we have assumed varying levels of development and/or marketing/promotion. The visitation projected under Alternative 1 represents potential market growth for the facility, but must be evaluated relative to the operating capacity of the house. Alternative 2 represents the projected visitation levels to the park, should the Visitor/Administration Building be developed, and Alternative 3 also includes the impact of further marketing and promotion. The alternatives are summarized below:

ALTERNATIVE SCENARIOS

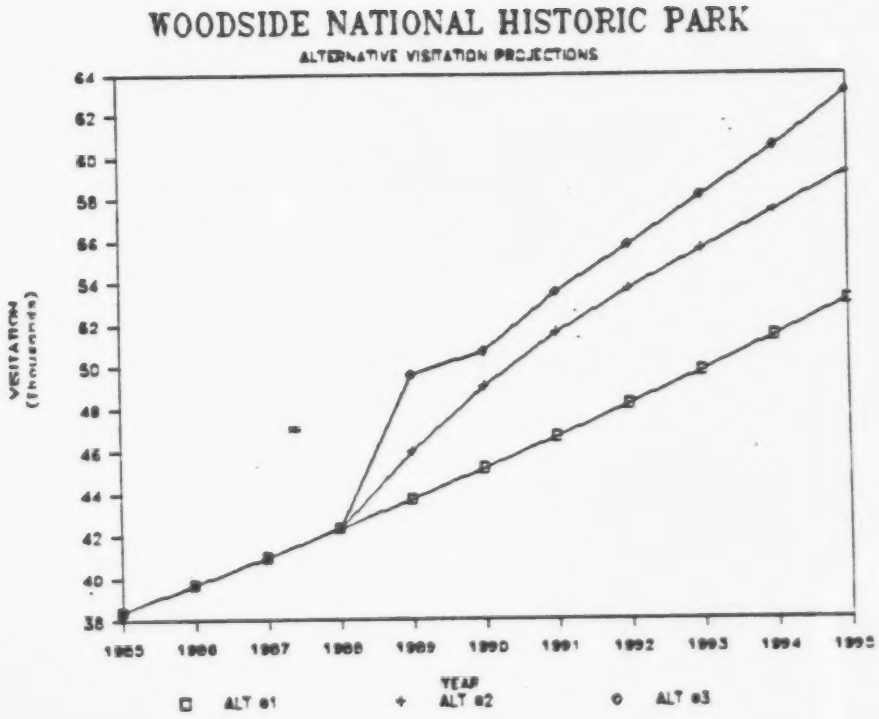
Visitation	Alternative 1	Alternative 2	Alternative 3
1985	38,391	38,391	38,391
1990	45,151	49,045	50,669
1995	53,156*	59,259	63,099
Annual Compound Growth (1985-1995)	3.3%	5.0%	5.1%
Average Annual Increase (1985-1995)	1,476	2,087	2,471

*represents theoretical market potential, however operational and functional capacity limitations suggest a lower level of achieved visitation

Exhibit V-6 indicates the relative attendance levels projected for each scenario. The growth rates and annual increases in visitation projections compare well with historic visitation trends at Woodside, with even the most optimistic scenario, Alternative 3, within past growth rates.

While visitation levels in 1995 show a difference of 6,103 visitors between Alternative 1 and Alternative 2 and 9,943 visitors between Alternative 1 and Alternative 3, in reality the differences may be even greater. As evidenced in the capacity analysis in the following section, the functional capacity of the house under Alternative 1 would make the projected attendance levels difficult to attain.

EXHIBIT V - 6


WOODSIDE NATIONAL HISTORIC PARK
ALTERNATIVE VISITATION PROJECTIONS
VISITATION (Thousands)
64
62
60
58
56
54
52
50
48
46
44
42
40
38
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
YEAR
ALT #1
ALT #2
ALT #3

SECTION VI CAPACITY ANALYSIS

6.1 Physical Capacity

Exhibit VI-1 evaluates the physical capacity of Woodside for accommodating visitors within the house. This analysis has been used to determine the number of individuals who could be effectively accommodated in the house at one time. The physical space and capacities discussed exclude public space in the basement (theatre, interpretive centre).

Overall, there are 755 square feet (70.1 square metres) of public space in the Woodside house. This space has been broken down by rooms and traffic areas and further differentiated by the ground floor and upstairs.

To determine the physical capacity of the house area requirements per visitor were utilized to determine total visitor capacity. Two capacities were utilized:

i) Stationary Capacity
   - 11.0 square feet/visitor in all viewing areas (1.0 square metres)

ii) Movement Capacity
   - 16.0 square feet/visitor in all traffic areas (1.5 square metres)

No standards exist for determining the maximum loading capacity for historic houses. In general, maximum loading will result from congestion at specific locations.

As an indication of when peak capacity has been reached, the staff of Woodside have empirically used the figure of 60 people in the house at any one time. However, the staff feels that capacity problems begin when approximately 40 people are in the house. Public space in the historic house of 755 square feet (70.1 square metres) suggests that at 40 visitors, an individual needs approximately 19 square feet (1.75 square metres) for an enjoyable visit. At 60 people in the house, an individual needs 12.6 square feet (1.2 square metres). Under current conditions the house is considered to be at capacity with 60 visitors in it at one time.

EXHIBIT VI-1

BUILDING CAPACITY ANALYSIS

Area	Space* (sq. mtrs)	Space* (sq. ft.)	Stationary Capacity (1 sq. mtr/visitor) (11.0 square feet)	Movement Capacity (1.5 sq. mtr/visitor) (16.0 square feet)
Historic House				
Ground Floor				
Rooms				
Parlour	3.1	33.4	3	2
Library	1.5	16.1	2	1
Dining Room	9.3	100.1	9	6
Pantry	3.3	35.5	3	2
Kitchen	8.5	91.5	9	6
Subtotal	25.7	276.6	26	17
Traffic Areas				
Vestibule	5.3	57.1	5	4
Lower Hall	12.2	131.3	12	8
Subtotal	17.5	188.4	18	12
Upstairs				
Rooms				
Guest Room	2.2	23.7	2	1
Cosy Corner	11.2	120.6	11	7
Master Bedroom	2.0	21.5	2	1
Subtotal	15.4	165.8	15	10
Traffic Upstairs				
Upper Hall	6.5	70.0	7	4
Stairs	5.0	53.8	5	3
Subtotal	11.5	123.8	12	8
Subtotal Rooms	41.1	442.4	41	27
Subtotal Traffic Areas	29.0	312.2	29	19
Total	70.1	754.6	70	47
**Rooms/Traffic Areas	60			

*Effective Usable Public Space (excludes areas not accessible to visitors)

**Calculates rooms capacity at stationary capacity and traffic areas at movement capacity

These figures agree with a study cited in the 1982 Parks Canada "Capacity Analysis" (p. 25) for which 16 to 20 square feet (1.5 to 1.9 square metres) was considered a maximum. By way of comparison, the building code gives 10.0 square feet (0.9 square metres)/person as the legal minimum which is unreasonably low.

The figures utilized in this analysis suggest that the minimum area requirements are adequate in stationary areas, but the maximum area requirements are necessary in movement areas. The resulting capacities are summarized below:

VISITOR CAPACITIES - WOODSIDE

	Stationary Areas	Traffic Areas	Total
Ground floor	26	12	38
Upstairs	15	7	22
Total House	41	19	60

As suggested, with rooms at stationary capacity and traffic areas at movement capacity, the total capacity of the house equals 60 visitors. However, at 60 visitors the traffic areas may in fact be overloaded, having only a movement capacity of 19. Therefore, with 50 percent of visitors viewing and 50 percent moving, the comfort capacity would be closer to 40 (19 x 2).

Other areas present capacity problems beyond the overall traffic areas. The vestibule entering the house has a total capacity of 4-5 people, the stairs leading upstairs have a capacity of 3-5. The interpretive centre (capacity estimate 60-70) is only accessible through the kitchen, which has a total capacity of 6-9. These loading pressure areas are summarized below.

LOADING PRESSURE AREAS

	Capacity
Interpretive Stairs	3-5
Stairs (to 2nd floor)	3-5
Vestibule	4-5
Upstairs Hallway	4-7
Kitchen	6-9
Downstairs Hallway	8-12

As a result, pressure points will exist whether there are 60 visitors or 40 visitors in the house at one time. However, with 40 visitors, the frequency of peak loading at these points is diminished. The design constraints could not be improved without major compromises to the historic accuracy of the building. Wide corridors and improved circulation patterns would require severe changes to the historic character of the interior. Similarly, the size of viewing areas within rooms is fixed by the design of the building.

6.2 Capacity Analysis

As visitation to Woodside increases so will the number of peak loading periods. Historically, this loading has occured during specific months, and in many cases is associated with special events and programs.

Exhibit VI-2 summarizes the peak loading which has occurred over the 1981 to 1985 time period at varying levels from 30 visitors or greater.

In 1985, 22 days of operation experienced loads of greater than 60 people (5.5%). Another 15 days experienced loads of 50-59, a total of 37 days over 50 (10.1%). Another 40 days at 40-49 people, for a total of 77 days (21.0%). As evidenced here, the lower the acceptable capacity, the higher the loading factor.

Exhibit VI-3 summarizes the percentage of operating days over the 1981-1985 period when various loading capacities (40, 50 and 60 people) were reached. Overall, 5% of all operating days over that period experienced loads in excess of 60 people with all years but 1981 experiencing this level of loading. A total of 8% of all operating days experienced loads in excess of 50 people, with this level reached in all but 1981 and 1984. A total of 14% of operating days experienced loading in excess of 40 people, with a high of 21% reached in 1985.

Traditionally, this loading has occurred to the greatest extent within the fall period (October, November and December) with the summer period also experiencing significant increases.

EXHIBIT VI-2

ESTIMATED PEAK HOUR FACILITY LOADING

(DURING PEAK MONTHS)

1981 - 1985

Estimated Number of Persons in House During Peak	Number of Days Per Month					
	June	July	Aug	Oct	Dec	Total
1981						
60+	2	0	0	N/A	4	6
50-59	3	3	3	N/A	2	11
40-49	5	5	5	N/A	7	22
30-39	5	5	5	N/A	7	22
1982						
60+	2	3	5	N/A	12	22
50-59	3	0	1	N/A	7	11
40-49	10	4	3	N/A	5	22
30-39	2	1	6	N/A	4	13
1983						
60+	N/A	1	2	6	14	23
50-59	N/A	4	3	4	1	12
40-49	N/A	3	4	2	8	17
30-39	N/A	4	6	5	1	16
1984*						
60+	2	1	0	N/A	14	17
50-59	1	1	0	N/A	6	6
40-49	0	2	1	N/A	7	10
30-39	0	3	2	N/A	2	7
1985						
60+	2	1	0	8	11	22
50-59	3	0	3	6	3	15
40-49	5	0	9	20	6	40
30-39	9	4	14	21	32	80

N/A = No Data Available

*Special event data only except for December. Missing regular event data for peak months.

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EXHIBIT VI-3
LOADING CAPACITY ANALYSIS

*Percentage of Operating Days

	Winter	Spring	Summer	Fall	Annual
1981					
60+	0%	2%	0%	4%	2%
50+	0%	5%	6%	6%	5%
40+	0%	10%	16%	13%	11%
1982					
60+	0%	2%	8%	12%	6%
50+	0%	5%	9%	19%	9%
40+	0%	15%	16%	24%	15%
1983					
60+	0%	0%	3%	20%	6%
50+	0%	0%	10%	25%	10%
40+	0%	0%	17%	35%	14%
1984					
60+	0%	2%	1%	14%	5%
50+	0%	3%	2%	20%	7%
40+	0%	3%	5%	27%	10%
1985					
60+	0%	2%	1%	19%	6%
50+	0%	5%	4%	28%	10%
40+	0%	10%	13%	54%	21%
Average (1981-1985)					
60+	0%	2%	3%	14%	5%
50+	0%	4%	7%	19%	8%
40+	0%	8%	14%	30%	14%

*Percentages are cumulative

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In the past, analysis of peak hour facility loading by Parks Service has concentrated on those months in which the greatest amount of loading occurs (June, July, August, October and December). The acceptable number of operating days for when loading occurs has been 25.0% of total operating days during each peak month. Annualized, 25% of operating days during the 5 peak operating months, equates to 10.5% of total operating days during the entire year. Based on discussions with Park staff as well as familiarity with operation of similar cultural resources, it is apparent that acceptable levels of loading are generally based on the operator's comfort and safety requirements as well as the level of visitor satisfaction. It has been suggested that should loading periods occur more than once per week on an annual basis (14%) of operating days, then unacceptable levels of loading have occurred. Based on our experience with similar facilities, we believe that this is an acceptable and maintainable loading level.

Our evaluation of peak loading periods has adapted historic monitoring patterns from a "peak month" basis, to a seasonal basis, and has adjusted the acceptable level of loading capacities to 14% of total operating days. This analysis will allow for the monitoring of peak periods in future years, during months where peaks are not currently occurring.

Utilizing the demand projections discussed in Section V, under Alternative 1 - Status Quo, we have evaluated the impact of increased visitation on loading capacities. These impacts are summarized for 1985, 1990 and 1995 in Exhibit VI-4.

Using the maximum building capacity of 60 visitors at one time it is suggested that the number of days with peak loading periods will increase from 22 in 1985 to 30 in 1990, and 52 in 1995, if the visitation projections are met. Excluding the Fall period (which includes a significantly high number of special event days in 1995, the spring and summer periods will experience a large number of peak loading periods, 11.8% and 14% of operating days respectively.

Using the comfort capacity of 40 visitors at one time suggests that the number of peak loading periods will stay relatively constant at 77 in 1985 to 79 in 1990 but will increase to 106 by 1995. During the summer of 1990, 24% of operating days will experience peak loads in excess of 40 visitors. This figure will increase to 34% in the summer of 1995.

EXHIBIT VI-4
PROJECTED LOADING
PEAK LOADING PERIODS

	Winter	Spring	Summer	Fall	Annual
Average 1981 - 1985					
60+	0	2	3	14	19
50-59	0	2	4	5	11
40-49	0	4	7	11	22
1985					
60+	0	2	1	19	22
50-59	0	3	3	9	15
40-49	0	5	9	26	40
1990					
60+	0	4	7	19	30
50-59	0	4	7	11	22
40-49	0	3	10	14	27
1995					
60+	0	8	14	30	52
50-59	0	3	10	14	27
40-49	0	3	10	14	27

Percentage of Operating Days

Average 1981 - 1985					
60+	0%	2%	3%	14%	5%
50+	0%	4%	7%	19%	8%
40+	0%	8%	14%	30%	14%
1985					
60+	0%	2%	1%	19%	6%
50+	0%	5%	4%	28%	10%
40+	0%	10%	13%	54%	21%
1990					
60+	0%	4%	7%	19%	8%
50+	0%	8%	14%	30%	14%
40+	0%	11%	24%	44%	22%
1995					
60+	0%	8%	14%	30%	14%
50+	0%	11%	24%	44%	22%
40+	0%	14%	34%	58%	30%

Utilizing the criteria of 14% for acceptable loading, loading is projected to occur during the following periods.

	40 Visitors	50 Visitors	60 Visitors
1990			
Winter	--	--	--
Spring	--	--	--
Summer	24.0%	14.0%	--
Fall	44.0%	30.0%	19.0%
Annual	22.0%	14.0%	--
1995			
Winter	--	--	--
Spring	14.0%	--	--
Summer	34.0%	24.0%	14.0%
Fall	58.0%	34.0%	30.0%
Annual	30.0%	22.0%	14.0%

Therefore, utilizing 14.0% of operating days as an acceptable loading capacity, this criteria would be exceeded in the summer and fall periods in 1990 with both a 40 and 50 person capacity. At 60 visitor capacity, unacceptable loading is met only in the fall period (where special event programming is extremely strong).

In 1995, with a 40 visitor capacity, loading would be unacceptable in all but the winter season, and at 50 and 60, during both the summer and fall.

6.3 Impact of Visitor/Administrative Building Development

Development of a visitor/administrative building at Woodside will not alleviate all of the loading problems, but it will relieve some of the more major ones. Specifically:

i) Peak loading in kitchen resulting from visitors accessing or egressing the interpretive centre will be eliminated.

ii) Remove need for visitors to utilize basement stairs.

iii) Loading at vestibule can be reduced by utilizing other door (currently in the administration area) as an exit. Suggesting one way traffic on both areas rather than two way currently utilizing the vestibule.

iv) The visitor/administrative building would serve as a holding area - a function currently handled in the vestibule or in the basement.

In addition, there are a variety of other considerations which impact or coulo improve the capacity problems evident at Woodside. These would include:

1. Visitor/Administrative Building

This building would act as a holding area until the house is reduced below capacity. As an average house tour lasts up to half an hour, the visitor centre should be designed to generate a dwell time of at least a similar amount.

The visitor centre would also eliminate congestion in the house caused by the basement access via the historic kitchen.

The building would not increase the viewing area within the entire complex. The areas presently used in the basement (1,231 square feet) would not be much different than that

proposed in the visitor/administrative building. However, because of the location and redesign of the proposed facility, the potential for a longer dwell time for visitors is created.

2. Development of grounds as an addition to house tour

At the present time the house is the principal feature to visit. When the gardens and outbuildings are developed visitors will spend a longer time on the site. This will provide some discretionary time in which the visitor can enter the house and avoid crowded times. This option would apply primarily in the summer and to casual, not group, visitors.

3. Regulate entry into house at peak times

During periods of peak capacity, the staff could prevent additional visitors from entering the historic house. This option would be less unpopular if the grounds and visitor/administrative facility are available to visit as an alternative.

4. Redesign circulation inside historic house

If all movement in the house moved in one direction, the number of congestion points would be removed. For example, at Mount Vernon, the public space is not substantially larger than at Woodside. Yet Mount Vernon can accommodate in excess of one million visitors per year.

Modifying the circulation within Woodside is not possible without substantial changes to the physical design of the building. A new exit would have to be constructed from the second floor. Within the time frame projected by this study, other methods can be used to reduce capacity peaks.

5. Remove in-house programming during peak periods

Demonstrations of cooking, for example, may create congestion points within the historic house during peak hours. If demonstrations create congestion, they could be discontinued during peak periods.

6. Spread visitation throughout the day

Peak visitation occurs when several buses arrive at the same time, during special events, and during traditionally popular visiting hours.

If necessary, special events could be scheduled at other times than popular visiting hours. Discount admission could be offered to groups for off peak days or hours. It may be possible to schedule groups into off peak days or hours.

7. Speed up tour during peak periods

Presently a tour requires 15 to 30 minutes. Reducing the time within the historic building would increase the hourly capacity of the building. It is unlikely, however, that an enjoyable tour could be taken in less than 15 minutes.

As mentioned in #5 above, demonstrations could be stopped during these periods. As well, guides could be discouraged from providing more than minimal information. Such actions would decrease the quality of the visit.

SECTION VII MARKETING AND PROMOTIONAL GUIDELINES

In general terms the current marketing and promotional practices at Woodside are adequate. However, these functions often suffer due to availability of person years and marketing/promotional budget. Many of the guidelines expressed here are presently in place at Woodside and need only to be reinforced. To fully implement these guidelines, it would be necessary to provide for additional staff and budget (.5 person year, $12,500 salary and $5,500 goods and service).

The marketing areas addressed here have included the following:

1. Goals and Objectives
2. Market Segmentation
3. Market Mix
4. Timing
5. Action Plan
   - Public Relations Program
   - Advertising/Promotion Program
   - Market Research

These areas are addressed on the following pages.

7.1 Goals and Objectives

Goals

- to maximize visitor experience
- to achieve an optimal level of park visitation throughout the year

Objectives

- to provide comprehensive and timely information to potential visitors and residents in the Region of Waterloo
- to develop the appropriate promotional and informational avenues to reach target markets

7.2 Market Segmentation

Five major market segments have been identified as having potential to be attracted to Woodside National Historic Park: residents of Waterloo Region, tourists, school groups, tour groups, and special interest groups. Definitions of each are outlined below:

(i) Casual Visitors (Residents/Tourists) - This market segment includes several sources of demand. These include day-visitors to the region; overnight visitors staying at commercial accommodation or friends and relatives; and permanent residents of the Waterloo Region.

(ii) Tour Groups - This market segment includes day tours to the Region of Waterloo or extended visit tours coming into the Waterloo area or leaving the Waterloo area who would consider including Woodside on their tours. A significant number of these tours would be comprised of senior citizens. Origins of such tours include primarily, Ontario, boarder states, and Quebec.

(iii) School Groups - This market segment includes elementary and secondary schools that are within a day trip from Woodside and which are able to fit Woodside into their curriculum. In 1985, 66.7% of school groups were from Kitchener/Waterloo and 29.3% were from elsewhere in Waterloo Region.

(iv) Special Interest Groups - This market segment includes those persons or groups with a special interest in political history, the history of Berlin, the Victorian era, etc. This segment will include a mix of individuals and groups including universities with history, politics, museum management programs; Women's groups, ie. Women's Institute, historical groups, etc.

7.3 Timing Considerations

It is important that the promoted product is available to the market. In tourism, all of the services advertised must be available or the visitor will be dissatisfied and it will be very difficult to attract repeat visits. "Word of Mouth" is the most cost-effective method of promotion in the tourism industry; however, it also can be the most detrimental.

Marketing is affected by the timing of development; therefore, a long-term marketing plan must be flexible to allow annual updating to reflect changes in the markets, and park development and upgrading.

7.4. Action Plan

(i) Public Relations Program

- hosting travel writers
- participation in FAM tours to Kitchener/Waterloo
- image - appearance and behaviour of personnel
- membership in local tourism and business associations:
  - Festival Country Tourism Association
  - Kitchener Visitor and Convention Bureau
  - Interpretation Canada
  - Attractions Ontario
- co-operate with local groups and individuals in programs designed to improve the image and visitor appeal of the area
- hold "official opening" for visitor/administration building; invite representatives of the following agencies:
  - provincial government
  - local government
  - local tourism and other businesses
  - travel trade
  - local community
  - TV and radio personalities
  - media
  - school consultants
  - special interest groups

(ii) Advertising/Promotion Program

a) Promotional Materials

- lure brochure

- interpretive brochure
- self-guide brochure
- education programmes guide
- special event(s) brochures
- posters for special events
- information kit (include - lure brochure, self-guide brochure, special event borchures, posts, and further information on the activities and attractions in Kitchener/Waterloo area)

b) Other Literature

Entries should be in the following publications and regularly updated:

- Parks Canada - Guide to Canada's National Historic Parks and other publications
- Ministry of Tourism - Ontario
  - Travellers Encyclopaedia
  - Travel Counsellor's Directory
  - Day Trips from Toronto
  - Winter Events
  - Spring Events
  - Summer Events
  - Fall Events
- Festival Country Travel Association publications
- Kitchener VCB - publications
- Canadian Automobile Association
  - Ontario Tour Book

c) Media Advertising/Publicity

- advertising in local/regional papers/publications for special events
- press releases supplemented with photographs should be issued by the superintendent on a regular basis - special events/informative editorials about the historical or political aspects of the park

d) Direct Mail

- tour groups - existing
- tour groups - potential
- school groups - existing
- school groups - potential
- media - invitations to special events

e) Information Program

- distribution of brochures/posters
  - commercial accommodation properties
  - attractions
  - Kitchener VCB
  - Information booths in Waterloo Region
  - MTR Information Centres
- brochure mailings as follow-up to telephone or mail inquiries
- information kit (with appropriate information for each group)
  - tour operators
  - school groups
  - special interest groups
- follow-up telephone calls to recipients of the information kits
- familiarization tours for tour operators/local tourism information staff/media - travel writers

f) Travelling Exhibit

- Schools
- Malls
- Libraries
- Events (Local/Regional/Provinical)

(iii) Market Research

- Daily visitor information
- Records of group/school visitation, the name of the operator and group, address and other details
- Records and monitoring data of sales program advertising and promotion
- Attendance at other parks and attractions in the area
- Indicators from other sectors of the tourism industry such as accommodation occupancies and trends
- An on-site survey should be administered at least every other year to determine visitor satisfaction, origin, socio-economic information, length of stay, etc. This should be undertaken in conjunction with Parks Service Socio Economic Research Unit

A comprehensive market research program is attainable if the above data is collected, maintained and analyzed. A successful market research program will aid park management in determining the success of their marketing efforts, and in identifying trends, and will also suggest additional methods of successful promotion for the park.

SECTION VIII CONCLUSIONS

It is apparent from the scope of research and analysis conducted for this study, that development of a visitor/administration building at Woodside is not only desirable, but in fact is required to service the current and projected operational needs of Woodside. Factors such as safety, congestion, and other operating limitations can only be alleviated through the development of this building.

Analysis also suggests that current capacity problems at Woodside will only get worse as attendance levels increase, to the point where visitation is negatively impacted by these problems. The detailed capacity analysis shows that the existing historic building will reach peak loadings of between 40-50 visitors some 30 to 70 percent of the time annually by 1995. The visitor building will not only alleviate many of these problems, it will lead to even stronger visitation levels to the site.

It therefore, is our recommendation that Parks Service strongly consider the development of a visitor/administrative building to accommodate 50 visitors at Woodside National Historic Park and allocate the required capital and operating funds.

APPENDIX A
PROJECT BIBLIOGRAPHY

WOODSIDE NATIONAL HISTORIC PARK

PROJECT BIBLIOGRAPHY

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"Holiday Garlands - Historic Houses Re-Create the Victorian Christmas", Canadian Collector, November/December 1981

Woodside National Historic Park, Garden Party Report, Kitchener: Parks Canada, June/July 1985

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APPENDIX B
PROJECT CONTACT LIST

CONTACT LIST

Regional Tourism

1. Kitchener Convention and Visitor Bureau, Kitchener
   Contact: Marcia Shortreed, Co-ordinator
   Telephone: (519) 576-5000

2. Ministry of Tourism Land Recreation, Kitchener
   Contact: Steven Pearce, Tourism Industry Consultant
   Telephone: (519) 578-3600

3. Doon Pioneer Village, Kitchener
   Contact: Martin Lewis/Nancy Kennings
   Telephone: (519) 893-1914

4. Historic Brubacher House, Waterloo
   Contact: I. Habermehl
   Telephone: (519) 886-3855

5. Schneider Haus, Kitchener
   Contact: Martin Lewis/Nancy Kennings
   Telephone: (519) 893-1914

Comparable Sites

1. Bell Homstead, Brantford, Ontario
   Contact: Mr Studier, Curator
   Telephone: (519) 756-6220

2. Bellevue House National Historic Park, Kingston, Ontario
   Contact: Edward Friel, Curator
   Telephone: (613) 542-3858

3. Bethune Memorial House, Gravenhurst, Ontario
   Contact: Mary Ellen Corcilli, Interpretive Supervisor
   Telephone: (705) 687-4261

4. Dundurn Castle, Hamilton, Ontario
   Contact: Terry Barlett, Monator
   Telephone: (416) 522-5313

5. Gibson House, Toronto, Ontario
   Contact: Christine Castle, Curator
   Telephone: (416) 225-0146

6. Hildene, Manchester, Vermont
   Contact: Oscar Johnson, Director/Clair Schoffstall, V.P. Programming
   Telephone: (802) 362-1788

7. Louis St. Laurent National Historic Park, Compton, Quebec
   Contact: France Provencher
   Telephone: (819) 835-5448

8. Mackenzie House, Toronto, Ontario
   Contact: George Waters, Toronto Historical Board
   Janet Hare, Senior Guide-Interpretor
   Telephone: (416) 366-1371

9. Monticello, Charlottesville, Virginia
   Contact: Daniel Jordan, Director/Milly Travis, Public Affairs Officer
   Telephone: (804) 295-8181

10. Mount Vernon, Mount Vernon, Virginia
    Contact: Jim Rees, Director
    Telephone: (703) 780-2000

11. Sir Wilfrid Laurier House National Historic Park, Ville-des-Laurentides, Quebec
    Contact: Anne Marie Collins, Superintendent
    Telephone: (514) 439-3702

12. Stratford Hall Plantation, Stratford, Virginia
    Contact: Elizabeth Lawrent, Curator
    Telephone: (804) 493-8038

Special Interest Groups

1. A.R. Kaufman YMCA, Kitchener, Ontario
   Contact: Kim Williams
   Telephone: (519) 743-5201

2. Canadian Automobile Association, Kitchener - Waterloo, Ontario
   Contact: Sandy Stewart, Supervisor of Auto-Touring Department
   Telephone (519) 576-1020

3. Peter Ertil Snyder Studio, Kitchener - Waterloo
   Contact: Maureen Schmidt
   Telephone: (519) 886-

4. Kitchener - Waterloo Hospital, Waterloo, Ontario
   Contact: Fran Jones
   Telephone: (519) 749-4250

5. Rockway Senior Citizens Centre, Kitchener, Ontario
   Contact: Karen Reimer
   Telephone: (519) 885-7395

6. Waterloo Family Y, Waterloo, Ontario
   Contact: Abe McFarlane, Program Executor
   Telephone: (519) 885-3500

7. Adult Recreation Centre Kitchener, Waterloo, Ontario
   Contact: Christine Barker/Helen Gagne
   Telephone: (519) 579-1020

8. Brownies
   Contact: Ruth Anne Solmnian, Brownie Leader
   Telephone: (519) 743-5649

Special Interest Groups - Convention

9. Kitchener Convention and Visitors Association
   Contact: Marcia Shortreed, Co-ordinator
   Telephone: (519) 576-5000

10. Waterloo Inn
    Contact: Janis Stolch,
    Telephone: (529) 884-0220

11. Valhalla Inn
    Contact: Beverly Esposito, Sales Manager
    Telephone: (519) 744-4141

Tour Operators

1. Marlene's Fun Tours, Woodstock, Ontario
   Contact: Marlene Boakes
   Telephone: (519) 424-9757

2. New Dimension Travel, Kuswick, Ontario
   Contact: Wayne Asquith
   Telephone: (519) 476-4353

3. Getaway Tours, Toronto, Ontario
   Contact: John
   Telephone: (416) 851-6758

4. Travelways, Thornhill, Ontario
   Contact: Lynn
   Telephone: (416) 731-2355

5. Peter Pan, Springfield, Massachusetts
   Contact: John Litchfield, Group Services
   Telephone: (416) 781-3343

6. Coles Coachline, Orangeville, Ontario
   Contact: Jane Coles
   Telephone: (519) 941-2582

7. Prestige Tours, Hamilton, Ontario
   Contact: Naiomi
   Telephone: (416) 528-8289

8. P & B Tours, Plymouth, Massachusetts
   Contact: Diana Richardson
   Telephone: (617) 746-0411

9. Milan Tours, Cleveland, Ohio
   Contact: Milan
   Telephone: (216) 289-0541

10. Munsen Travel, Chicago, Illinois
    Contact: Walter de Broeski
    Telephone: (312) 920-7960

11. AAA Club, Dayton, Ohio
    Contact: Nancy
    Telephone: (513) 294-5791

12. ATI Tours, Chicago, Illinois
    Contact: Kirby Major
    Telephone: (312) 463-3812

School Groups (Kitchener - Waterloo)

1. Keatsway Public School
   Contact: Brenda Howey, Teacher
   Telephone: (519) 886-1650

2. King Edward Public School
   Contact: Joy Hancock, Teacher
   Telephone: (519) 578-0220

3. Bluevale Collegiate Institute
   Contact: Ian Rankine, Teacher
   Telephone: (519) 885-4620

4. Tait Street School
   Contact: Susan Jackson, Teacher
   Telephone: (519) 621-7621

5. Central Public School
   Contact: Les Wells, Teacher
   Telephone: (519) 623-0940

6. Waterloo County Board of Education
   Contact: Warren Stauch, Consultant - Environmental Studies
   Telephone: (519) 742-1751

7. Waterloo County Board of Education
   Conact: Jill Snyder, Consultant - Primary Environmental Studies
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13. Judy Spencer and Associates, Stanford, Connecticutt
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14. Empire Trailways, Rochester, New York
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15. Allied Tour and Travel, Sioux City, Iowa
Contact: Lucille Gilbert
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16. D & F Transit/Niagara Scenic Tours, Buffalo, New York
Contact: Sue
Telephone: (716) 634-8563

17. Charter Bus Unlimited, Detroit, Michigan
Contact: Mrs. Carrol
Telephone: (313) 962-3003

18. PMCL, Midland, Ontario
Contact: Linda
Telephone: (705) 526-5438

19. Hanover Holiday Tours, Hanover, Ontrio
Telephone: (519) 364-4911

20. Trentway Wagner, Peterborough, Ontario
Telephone: (705) 748-6411